Microsoft

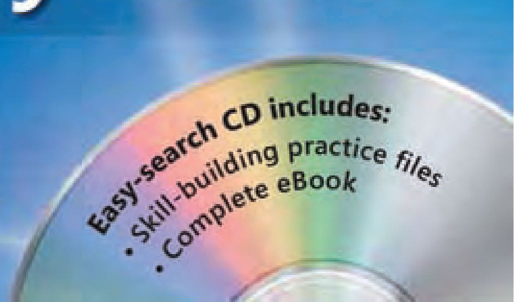
Step by Step

SECOND EDITION!

2007 Microsoft® Office System

Build *exactly* the skills you need.
Learn at the pace *you* want.

*Joyce Cox, Curtis Frye, Dow Lambert III, Steve Lambert,
John Pierce, Joan Preppernau*



PUBLISHED BY
Microsoft Press
A Division of Microsoft Corporation
One Microsoft Way
Redmond, Washington 98052-6399

Library of Congress Control Number: 2008920572

Printed and bound in the United States of America.

1 2 3 4 5 6 7 8 9 QWT 3 2 1 0 9 8

Distributed in Canada by H.B. Fenn and Company Ltd.

A CIP catalogue record for this book is available from the British Library.

Microsoft Press books are available through booksellers and distributors worldwide. For further information about international editions, contact your local Microsoft Corporation office or contact Microsoft Press International directly at fax (425) 936-7329. Visit our Web site at www.microsoft.com/mspress. Send comments to mspinput@microsoft.com.

Acquisitions Editor: Juliana Aldous Atkinson
Developmental Editor: Sandra Haynes
Project Editor: Valerie Woolley
Editorial Production: Online Training Solutions, Inc.

Body Part No. X14-55501

Contents

Part I Microsoft Office Word 2007

Introducing the 2007 Microsoft Office System

The 2007 Microsoft Office system is a collection of programs, servers, services, and solutions. To meet the varying needs of individuals and organizations, Microsoft offers eight suites of the most common desktop programs. *2007 Microsoft Office System Step by Step Second Edition* includes information about the following programs:

- **Microsoft Office Word 2007.** A sophisticated word-processing program with which you can quickly and effiiciently author and format documents.
- **Microsoft Office Excel 2007.** A powerful spreadsheet program with which you can analyze, communicate, and manage information.
- **Microsoft Office Access 2007.** A database program with which you can store and efficiently retrieve structured information.
- **Microsoft Office PowerPoint 2007.** A full-featured program with which you can develop and present dynamic, professional-looking presentations.
- **Microsoft Office Outlook 2007.** A personal information management program that includes e-mail, calendar, task, and contact capabilities.
- **Microsoft Office Publisher 2007.** A desktop publishing program with which you can design and produce eye-catching publications.
- **Microsoft Office OneNote 2007.** A digital notebook program in which you can collect, organize, and quickly locate many types of electronic information.
- **Microsoft Office Groove 2007.** A collaboration program with which you can communicate and work effectively with team members.

The book also includes a discussion of ways to use a SharePoint collaboration site to share information from different Office programs.

The Microsoft Office Fluent User Interface

Many of the programs in the 2007 Office system feature a new look and feel, as well as a new way of interacting with the program that is designed to make the commands you need, in the context of the task you are currently performing, easily available. This new feature set, which is named the *Microsoft Office Fluent user interface*, is available in Word, Excel, Access, PowerPoint, and Outlook.

Special features of the Microsoft Office Fluent user interface include:

- **The Office menu.** This menu, which appears when you click the Microsoft Office Button located in the upper-left corner of the program window, contains commands related to working with entire documents (rather than the document content).
- **The Office Fluent Ribbon.** Probably the most visible element of the Office Fluent user interface, the Ribbon replaces the menus and toolbars found in earlier versions of Office. Commands are arranged on the Ribbon on task-specific tabs.
- **The Office Fluent Quick Access Toolbar.** This toolbar provides easy access to the commands you use most frequently. You can change its position, add and remove commands, and create custom command groups for specific documents.
- **Contextual command availability.** Infrequently used commands, such as those specific to working with a table, a graphic, and headers and footers, appear only when you select one of those elements. A Mini toolbar displaying formatting commands appears when you select text.
- **Office Fluent Live Preview.** See the effect of a formatting change on selected text without applying the format.
- **Quick Styles, Layouts, and Formats.** These features provide professionally designed color palettes, themes, and graphic effects.
- **SmartArt graphics.** These graphics and new styles and formatting methods greatly simplify the process of creating and formatting a variety of documents.
- **Document inspection and finishing tools.** This collection of tools provides a way to safely share information with other people.

Certification

Desktop computing proficiency is becomingly increasingly important in today's business world. As a result, when screening, hiring, and training employees, more employers are relying on the objectivity and consistency of technology certification to ensure the competence of their workforce. As an employee or job seeker, you can use technology certification to prove that you already have the skills you need to succeed.

A Microsoft Certified Application Specialist (MCAS) is an individual who has demonstrated worldwide skill standards through a certification exam in Windows Vista or in one or more of the 2007 Microsoft Office programs, including Word, Excel, PowerPoint, Outlook, or Access. To learn more about the MCAS program, visit

www.microsoft.com/learning/mcp/mcas/

Information for Readers Running Windows XP

The graphics and operating system–related instructions in this book reflect the Windows Vista user interface. However, Windows Vista is not required; you can also use a computer running Windows XP.

Most of the differences you will encounter when working through the exercises in this book on a computer running Windows XP center around appearance rather than functionality. For example, the Windows Vista Start button is round rather than rectangular and is not labeled with the word *Start*; window frames and window-management buttons look different; and if your system supports Windows Aero, the window frames might be transparent.

In this section, we provide steps for navigating to or through menus and dialog boxes in Windows XP that differ from those provided in the exercises in this book. For the most part, these differences are small enough that you will have no difficulty in completing the exercises.

Managing the Practice Files

The instructions given in the "Using the Companion CD" section are specific to Windows Vista. On a computer running Windows Vista, the default installation location of the practice files is *Documents\Microsoft Press\2007OfficeSBS*. On a computer running Windows XP, the default installation location is *My Documents\Microsoft Press\2007OfficeSBS*. If your computer is running Windows XP, whenever an exercise tells you to navigate to your *Documents* folder, you should instead go to your *My Documents* folder.

To uninstall the practice files from a computer running Windows XP, follow this procedure:

1. On the Windows taskbar, click the **Start** button, and then click **Control Panel**.
2. In **Control Panel**, click (or in Classic view, double-click) **Add or Remove Programs**.
3. In the **Add or Remove Programs** window, click **2007 Microsoft Office System Step by Step, Second Edition**, and then click **Remove**.
4. In the **Add or Remove Programs** message box asking you to confirm the deletion, click **Yes**.

> **Important** If you need help installing or uninstalling the practice files, please see the "Using the Companion CD" section later in this book. Microsoft Product Support Services does not provide support for this book or its companion CD.

Using the Start Menu

Follow this procedure to start a program, such as Microsoft Office Word, on a computer running Windows XP:

- Click the **Start** button, point to **All Programs**, click **Microsoft Office**, and then click **Microsoft Office Word 2007**.

Folders on the Windows Vista Start menu expand vertically. Folders on the Windows XP Start menu expand horizontally.

Navigating Dialog Boxes

On a computer running Windows XP, some of the dialog boxes you will work with in the exercises not only look different from the graphics shown in this book but also work differently. These dialog boxes are primarily those that act as an interface between Office and the operating system, including any dialog box in which you navigate to a specific location.

To navigate to the *WordExploring* folder in Windows Vista:

- In the **Favorite Links** pane, click **Documents**. Then in the folder content pane, double-click *Microsoft Press*, *2007OfficeSBS*, and *WordExploring*.

To move back to the *2007OfficeSBS* folder in Windows Vista:


Back

- In the upper-left corner of the dialog box, click the **Back** button.

To navigate to the *WordExploring* folder in Windows XP:

- On the **Places** bar, click **My Documents**. Then in the folder content pane, double-click *Microsoft Press*, double-click *2007OfficeSBS*, and then double-click *WordExploring*.

To move back to the *2007OfficeSBS* folder in Windows XP:


Up One Level

- On the toolbar, click the **Up One Level** button.

Features and Conventions of This Book

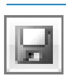
This book has been designed to lead you step by step through some of the tasks you are most likely to want to perform in the following 2007 Microsoft Office programs: Microsoft Office Word 2007, Microsoft Office Excel 2007, Microsoft Office Access 2007, Microsoft Office PowerPoint 2007, Microsoft Office Outlook 2007, Microsoft Office Publisher 2007, Microsoft Office OneNote 2007, and Microsoft Office Groove 2007. In addition to these programs, you will learn about ways to collaborate using SharePoint technologies.

If, after completing the exercises, you later need help remembering how to perform a procedure, the following features of this book will help you locate specific information:

- **Detailed table of contents.** A listing of the topics and sidebars within each chapter.
- **Topic-specific running heads.** Within a chapter, quickly locate the topic you want by looking at the running head of odd-numbered pages.
- **Quick Reference.** General instructions for each procedure covered in specific detail elsewhere in the book. Refresh your memory about a task while working with your own documents.
- **Detailed index.** Look up specific tasks and features and general concepts in the index, which has been carefully crafted with the reader in mind.
- **Companion CD.** Contains the practice files needed for the step-by-step exercises, as well as a fully searchable electronic version of this book and other useful resources.

In addition, we provide a glossary of terms for those times when you need to look up the meaning of a word or the definition of a concept.

You can save time when you use this book by understanding how the *Step by Step* series shows special instructions, keys to press, buttons to click, and so on.

Convention	Meaning
	This icon at the end of a chapter introduction indicates information about the practice files provided on the companion CD for use in the chapter.
USE	This paragraph preceding a step-by-step exercise indicates the practice files that you will use when working through the exercise.
BE SURE TO	This paragraph preceding or following an exercise indicates any requirements you should attend to before beginning the exercise or actions you should take to restore your system after completing the exercise.
OPEN	This paragraph preceding a step-by-step exercise indicates files that you should open before beginning the exercise.
CLOSE	This paragraph following a step-by-step exercise provides instructions for closing open files or programs before moving on to another topic.
1 **2**	Blue numbered steps guide you through step-by-step exercises and Quick Reference versions of procedures.
1 2	Black numbered steps guide you through procedures in sidebars and expository text.
➜	An arrow indicates a procedure that has only one step.
See Also	These paragraphs direct you to more information about a given topic in this book or elsewhere.
Troubleshooting	These paragraphs explain how to fix a common problem that might prevent you from continuing with an exercise.
Tip	These paragraphs provide a helpful hint or shortcut that makes working through a task easier, or information about other available options.
Important	These paragraphs point out information that you need to know to complete a procedure.
 Save	The first time you are told to click a button in an exercise, a picture of the button appears in the left margin. If the name of the button does not appear on the button itself, it appears under the picture.
Enter	In step-by-step exercises, keys you must press appear as they would on a keyboard.
Ctrl+Home	A plus sign (+) between two key names means that you must hold down the first key while you press the second key. For example, "press Ctrl+Home" means "hold down the Ctrl key while you press the Home key."
Program interface elements	In steps, the names of program elements, such as buttons, commands, and dialog boxes, are shown in black bold characters.
User input	Anything you are supposed to type appears in blue bold characters.
Glossary terms	Terms that are explained in the glossary at the end of the book are shown in blue italic characters in the chapters.

Using the Companion CD

The companion CD included with this book contains practice files you can use as you work through the book's exercises. By using practice files, you won't waste time creating samples and typing large amounts of data. Instead, you can jump right in and concentrate on learning how to use the programs.

What's on the CD?

The following table lists the practice files supplied on the book's companion CD.

Chapter	Folder\File
Chapter 1: Exploring Word 2007	*WordExploring\Opening.docx* *WordExploring\Printing.docx* *WordExploring\Viewing1.docx* *WordExploring\Viewing2.docx*
Chapter 2: Editing and Proofreading Documents	*WordEditing\Changes.docx* *WordEditing\Finalizing.docx* *WordEditing\FindingText.docx* *WordEditing\FindingWord.docx* *WordEditing\Outline.docx* *WordEditing\SavedText.docx* *WordEditing\Spelling.docx*
Chapter 3: Changing the Look of Text	*WordFormatting\Characters.docx* *WordFormatting\Lists.docx* *WordFormatting\Paragraphs.docx* *WordFormatting\QuickFormatting.docx*
Chapter 4: Presenting Information in Columns and Tables	*WordPresenting\Calculations.docx* *WordPresenting\Columns.docx* *WordPresenting\Loan.xlsx* *WordPresenting\LoanData.xlsx* *WordPresenting\Memo.docx* *WordPresenting\Table.docx* *WordPresenting\TableAsLayout.docx* *WordPresenting\TabularList.docx*

Chapter	Folder\File
Chapter 5: Setting Up a Workbook	*ExcelCreating\Exception Summary.xlsx* *ExcelCreating\Route Volume.xlsx*
Chapter 6: Working with Data and Data Tables	*ExcelData\2007Q1ShipmentsByCategory.xlsx* *ExcelData\Average Deliveries.xlsx* *ExcelData\Driver Sort Times.xlsx* *ExcelData\Series.xlsx* *ExcelData\Service Levels.xlsx*
Chapter 7: Performing Calculations on Data	*ExcelFormulas\ConveyerBid.xlsx* *ExcelFormulas\ITExpenses.xlsx* *ExcelFormulas\PackagingCosts.xlsx* *ExcelFormulas\VehicleMiles.xlsx*
Chapter 8: Changing Workbook Appearance	*ExcelAppearance\acbluprt.jpg* *ExcelAppearance\callcenter.jpg* *ExcelAppearance\CallCenter.xlsx* *ExcelAppearance\Dashboard.xlsx* *ExcelAppearance\ExecutiveSearch.xlsx* *ExcelAppearance\HourlyExceptions.xlsx* *ExcelAppearance\HourlyTracking.xlsx* *ExcelAppearance\VehicleMileSummary.xlsx*
Chapter 9: Creating a Database	*AccessCreating\Manipulating.accdb* *AccessCreating\TableTemplate.accdb*
Chapter 10: Simplifying Data Entry by Using Forms	*AccessSimplifying\AddControls.accdb* *AccessSimplifying\AddSubform.accdb* *AccessSimplifying\AftUpdate.txt* *AccessSimplifying\CreateFormTool.accdb* *AccessSimplifying\CreateWizard.accdb* *AccessSimplifying\CustomersFormLogo.jpg* *AccessSimplifying\RefineLayout.accdb* *AccessSimplifying\RefineProperties.accdb* *AccessSimplifying\VBA.accdb*
Chapter 11: Locating Specific Information	*AccessLocating\Calculate.accdb* *AccessLocating\FilterForm.accdb* *AccessLocating\FilterTable.accdb* *AccessLocating\MultipleCriteria.accdb* *AccessLocating\QueryDesign.accdb* *AccessLocating\QueryWizard.accdb* *AccessLocating\SortTable.accdb*

Chapter	**Folder\File**
Chapter 12 Keeping Your Information Accurate	*AccessKeeping\Accurate.accdb* *AccessKeeping\Delete.accdb* *AccessKeeping\FieldTest.accdb* *AccessKeeping\MulticolumnLookup.accdb* *AccessKeeping\Prevent.accdb* *AccessKeeping\SimpleLookup.accdb* *AccessKeeping\Size.accdb* *AccessKeeping\Update.accdb* *AccessKeeping\Validate.accdb*
Chapter 13: Starting a New Presentation	*PptStarting\Converting.docx* *PptStarting\Creating.pptx* *PptStarting\Reusing1.pptx* *PptStarting\Reusing2.pptx*
Chapter 14: Working with Slide Text	*PptWorking\Changing.pptx* *PptWorking\Correcting.pptx* *PptWorking\Editing.pptx* *PptWorking\Finding.pptx* *PptWorking\Spelling.pptx* *PptWorking\TextBoxes.pptx*
Chapter 15: Adjusting the Layout, Order, and Look of Slides	*PptAdjusting\Background.pptx* *PptAdjusting\ColorScheme.pptx* *PptAdjusting\Layout.pptx* *PptAdjusting\OtherColors.pptx* *PptAdjusting\Rearranging.pptx* *PptAdjusting\Theme1.pptx* *PptAdjusting\Theme2.pptx*
Chapter 16: Delivering a Presentation Electronically	*PptDelivering\Adapting.pptx* *PptDelivering\NotesHandouts.pptx* *PptDelivering\Rehearsing.pptx* *PptDelivering\Showing.pptx* *PptDelivering\Travel.pptx* *PptDelivering\YinYang.png*
Chapter 17: Sending E-Mail Messages	*OutlookSending\Attaching.docx* *OutlookSending\Attaching.pptx*
Chapter 18: Managing Your Inbox	None

Chapter	Folder\File
Chapter 19: Managing Appointments, Events, and Meetings	None
Chapter 20: Managing Your Calendar	None
Chapter 21: Creating Colorful Cards and Calendars	*PublisherCards\Arizona10.jpg* *PublisherCards\DataSource.xlsx* *PublisherCards\FoldedCard.pub* *PublisherCards\Logo.png* *PublisherCards\Postcard.pub*
Chapter 22: Creating Text-Based Publications	*PublisherPublications\ADatumNews.pub*
Chapter 23: Collecting Information in a Notebook	*OneCollecting\Arizona01.jpg–Arizona03.jpg* *OneCollecting\Logo_ADatum.jpg* *OneCollecting\Organization101.pptx* *OneCollecting\SBS Collecting* notebook
Chapter 24: Organizing and Locating Information	*OneOrganizing\SBS Moving* notebook
Chapter 25: Setting Up a Standard Workspace	*GrooveWorkspace\Marketing_Plan_DRAFT.docx* *GrooveWorkspace\WideWorldImporters.gsa*
Chapter 26: Managing and Sharing Files	*GrooveFiles\Event budget.xltx* *GrooveFiles\Quarter1_Forecasts.xlsx*
Chapter 27: Enabling Collaboration by Using SharePoint	*SharePoint\Book Series.pptx* *SharePoint\Information Sheet.docx* *SharePoint\Interior Design.pptx* *SharePoint\Loan Data.xlsx* *SharePoint\SalesData.xlsx*

In addition to the practice files, the CD contains some exciting resources that will really enhance your ability to get the most out of using this book and the 2007 Microsoft Office system, including the following:

- *2007 Microsoft Office System Step by Step Second Edition*
- *Microsoft Computer Dictionary, Fifth Edition*
- Sample chapter and poster from *Look Both Ways: Help Protect Your Family on the Internet* (Linda Criddle, 2007)
- Windows Vista Product Guide

> **Important** The companion CD for this book does not contain the 2007 Office system software. You should purchase and install the software before using this book.

Minimum System Requirements

This book includes discussions of the following programs in the 2007 Microsoft Office system:

- Microsoft Office Word 2007
- Microsoft Office Excel 2007
- Microsoft Office Access 2007
- Microsoft Office PowerPoint 2007
- Microsoft Office Outlook 2007
- Microsoft Office Publisher 2007
- Microsoft Office OneNote 2007
- Microsoft Office Groove 2007
- Microsoft SharePoint products and technologies

To install and run these programs, your computer needs to meet the following minimum requirements:

- 500 megahertz (MHz) processor
- 256 megabytes (MB) RAM
- CD or DVD drive
- 2 gigabytes (GB) available hard disk space; a portion of this disk space will be freed if you select the option to delete the installation files

  > **Tip** Hard disk requirements will vary depending on configuration; custom installation choices might require more or less hard disk space.

- Monitor with 800 × 600 screen resolution; 1024 × 768 or higher recommended

- Keyboard and mouse or compatible pointing device
- Internet connection, 128 kilobits per second (Kbps) or greater, for download and activation of products, accessing Microsoft Office Online and online Help topics, and any other Internet-dependent processes
- Windows Vista or later, Windows XP with Service Pack 2 (SP2), or Windows Server 2003 or later
- Windows Internet Explorer 7 or Microsoft Internet Explorer 6 with service packs

In addition to the hardware, software, and connections required to run the 2007 Office system, you will need the following to successfully complete the exercises in this book:

- Word 2007, Excel 2007, Access 2007, PowerPoint 2007, Outlook 2007, Publisher 2007, OneNote 2007, Groove 2007, and access to a SharePoint site.
- Access to a printer
- 360 MB of available hard disk space for the practice files

Installing the Practice Files

You need to install the practice files in the correct location on your hard disk before you can use them in the exercises. Follow these steps:

1. Remove the companion CD from the envelope at the back of the book, and insert it into the CD drive of your computer.

   The Step By Step Companion CD License Terms appear. Follow the on-screen directions. To use the practice files, you must accept the terms of the license agreement. After you accept the license agreement, a menu screen appears.

   > **Important** If the menu screen does not appear, click the Start button and then click Computer. Display the Folders list in the Navigation pane, click the icon for your CD drive, and then in the right pane, double-click the StartCD executable file.

2. Click **Install Practice Files**.
3. Click **Next** on the first screen, and then click **Next** to accept the terms of the license agreement on the next screen.

4. If you want to install the practice files to a location other than the default folder (*Documents\Microsoft Press\2007OfficeSBS*), click the **Change** button, select the new drive and path, and then click **OK**.

> **Important** If you install the practice files to a location other than the default, you will need to substitute that path within the exercises.

5. Click **Next** on the **Choose Destination Location** screen, and then click **Install** on the **Ready to Install the Program** screen to install the selected practice files.
6. After the practice files have been installed, click **Finish**.
7. Close the **Step by Step Companion CD** window, remove the companion CD from the CD drive, and return it to the envelope at the back of the book.

Using the Practice Files

When you install the practice files from the companion CD that accompanies this book, the files are stored on your hard disk in chapter-specific subfolders under *Documents\Microsoft Press\2007OfficeSBS* unless you specify a different location during installation. Each exercise is preceded by one or more paragraphs listing the files needed for that exercise and explaining any preparations needed before you start working through the exercise. Here is an example:

> **USE** the *Worksheets* presentation and the *Costs* workbook. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\PptWorking* folder.
>
> **BE SURE TO** start PowerPoint before beginning this exercise.
>
> **OPEN** the Worksheets presentation.

You can display the practice file folder in Windows Explorer by following these steps:


Start

→ On the Windows taskbar, click the **Start** button, click **All Programs**, click **Microsoft Press**, and then click **2007 Office System Step by Step**.

You can browse to the practice files from a dialog box by following these steps:

1. In the **Favorite Links** pane of the dialog box, click **Documents**.
2. In your *Documents* folder, double-click *Microsoft Press*, double-click *2007OfficeSBS*, and then double-click the specified chapter folder.

Removing and Uninstalling the Practice Files

You can free up hard disk space by uninstalling the practice files that were installed from the companion CD. The uninstall process deletes any files that you created in the *Documents\Microsoft Press\2007OfficeSBS* chapter-specific folders while working through the exercises. Follow these steps:


Start

1. On the Windows taskbar, click the **Start** button, and then click **Control Panel**.
2. In **Control Panel**, under **Programs**, click the **Uninstall a program** task.
3. In the **Programs and Features** window, click **2007 Microsoft Office System Step by Step, Second Edition**, and then on the toolbar at the top of the window, click the **Uninstall** button.
4. If the **Programs and Features** message box asking you to confirm the deletion appears, click **Yes**.

> **Important** Microsoft Product Support Services does not provide support for this book or its companion CD.

Getting Help

Every effort has been made to ensure the accuracy of this book and the contents of its companion CD. If you do run into problems, please contact the sources listed in the following sections for assistance.

Getting Help with This Book and Its Companion CD

If your question or issue concerns the content of this book or its companion CD, please first search the online Microsoft Press Knowledge Base, which provides support information for known errors in or corrections to this book, at the following Web site:

www.microsoft.com/mspress/support/search.asp

If you do not find your answer at the online Knowledge Base, send your comments or questions to Microsoft Press Technical Support at:

mspinput@microsoft.com

Getting Help with an Office Program

If your question is about a specific application, and not about the content of this book, your first recourse is the Office Help system. This system is a combination of tools and files stored on your computer when you installed the 2007 Microsoft Office system and, if your computer is connected to the Internet, information available from Microsoft Office Online. You can find general or specific Help information in several ways:

- To find out about an item on the screen, you can display a ***ScreenTip***. For example, to display a ScreenTip for a button, point to the button without clicking it. The ScreenTip gives the button's name, the associated keyboard shortcut if there is one, and unless you specify otherwise, a description of the associated action.

Help

- You can click the Help button in the upper-right corner of the program window to display the Help window.
- In a dialog box, you can click the Help button at the right end of the dialog box title bar to display the Help window with topics related to the functions of that dialog box already identified.

To practice getting help in an Office application, using Microsoft Office PowerPoint 2007 as an example, you can work through the following exercise.

BE SURE TO start PowerPoint before beginning this exercise.

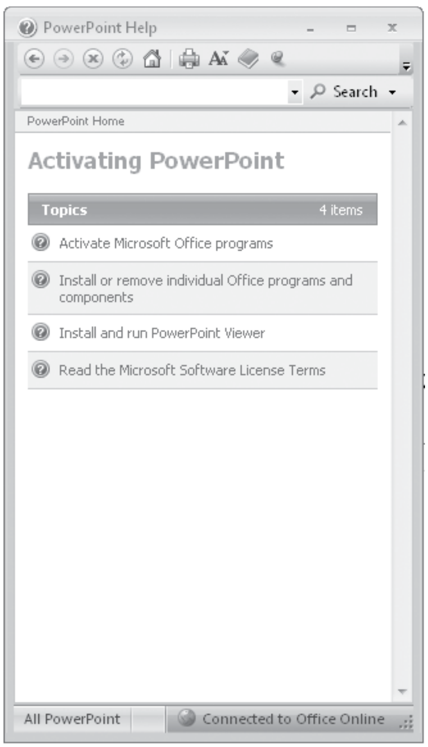

Help

1. At the right end of the Office Fluent Ribbon, click the **Help** button.

   The PowerPoint Help window opens.

2. In the list of topics in the **PowerPoint Help** window, click **Activating PowerPoint**.

   PowerPoint Help displays a list of topics related to activating Microsoft Office system programs.



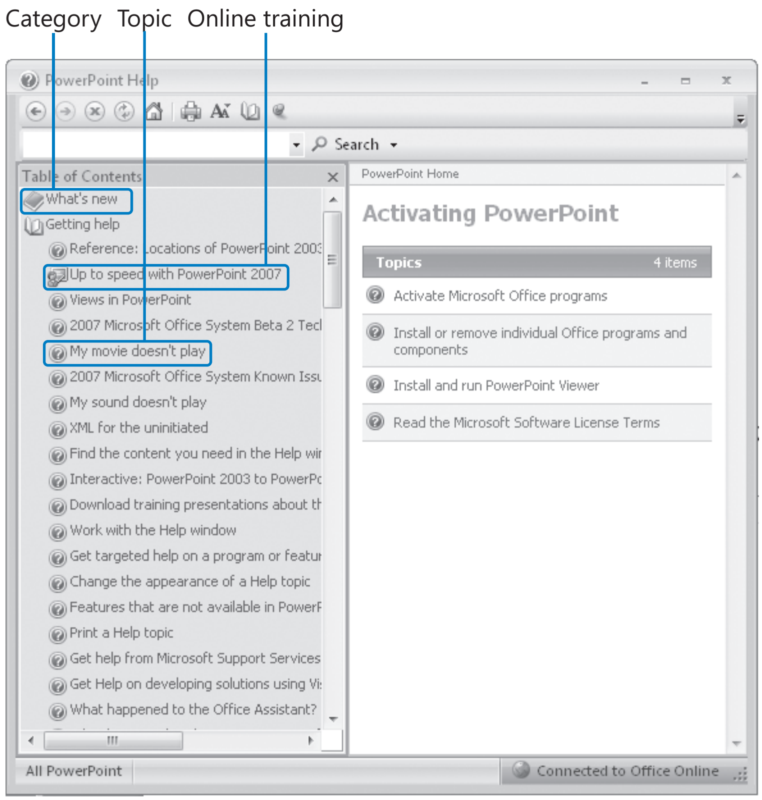
You can click any topic to display the corresponding information.

Show Table of Contents

3. On the toolbar, click the **Show Table of Contents** button.

The Table Of Contents appears in the left pane, organized by category, like the table of contents in a book.

Clicking any category (represented by a book icon) displays that category's topics (represented by help icons) as well as any available online training (represented by training icons).



If you're connected to the Internet, PowerPoint displays topics and training available from the Office Online Web site, as well as topics stored on your computer.

Back

Forward

4. In the **Table of Contents**, click a few categories and topics, and then click the **Back** and **Forward** buttons to move among the topics you have already viewed.

Close

5. At the right end of the **Table of Contents** title bar, click the **Close** button.

6. At the top of the **PowerPoint Help** window, click the **Type word to search for** box, type **Help window**, and then press the Enter key.

   The PowerPoint Help window displays topics related to the words you typed.

7. In the results list, click **Print a Help topic**.

   The selected topic appears in the PowerPoint Help window, explaining that you can click the Print button on the toolbar to print any topic.

8. Below the title at the top of the topic, click **Show All**.

   PowerPoint displays any hidden auxiliary information available in the topic and changes the Show All button to Hide All. You can display or hide an individual item by clicking it. When you click the Print button, PowerPoint will print all displayed information.

CLOSE the PowerPoint Help window.

More Information

If your question is about a Microsoft software product and you cannot find the answer in the product's Help system, please search the appropriate product solution center or the Microsoft Knowledge Base at:

support.microsoft.com

In the United States, Microsoft software product support issues not covered by the Microsoft Knowledge Base are addressed by Microsoft Product Support Services. Location-specific software support options are available from:

support.microsoft.com/gp/selfoverview/

About the Authors

Joyce Cox

Joyce has more than 25 years' experience in the development of training materials about technical subjects for non-technical audiences, and is the author of dozens of books about Microsoft Office and Windows technologies. She is the Vice President of Online Training Solutions, Inc. (OTSI). She was principal author for Online Press, where she developed the *Quick Course* series of computer training books for beginning and intermediate adult learners. She was also the first managing editor of Microsoft Press, an editor for Sybex, and an editor for the University of California. Joyce and her husband Ted live in downtown Bellevue, Washington, and escape as often as they can to their tiny, offline cabin in the Cascade foothills.

Curtis Frye

Curt is a freelance writer and Microsoft Most Valuable Professional for Microsoft Office Excel. He lives in Portland, Oregon, and is the author of eight books from Microsoft Press. He has also written numerous articles for the Microsoft Work Essentials Web site. Before beginning his writing career in June 1995, Curt spent four years with The MITRE Corporation as a defense trade analyst and one year as Director of Sales and Marketing for Digital Gateway Systems, an Internet service provider. Curt graduated from Syracuse University in 1990 with an honors degree in political science. When he's not writing, Curt is a professional improvisational comedian with ComedySportz Portland.

M. Dow Lambert III

During 20 years in academia, Dow authored or co-authored 19 social science research publications, developed curriculum and training programs for social services professionals, and managed longitudinal studies of human behavior. In 1995, he moved from academia to the private sector, where he worked for a small company that developed and maintained reservation systems for the travel industry. Here, he learned the difference between writing research reports for scientific journals, writing technical specifications for programmers, and writing user guides for the people who actually needed to understand and use the software that his company produced. In his spare time, Dow and his wife Marlene enjoy birding and bird photography.

Steve Lambert

Steve has written 18 books, most of which are about Microsoft applications. As President of Online Publishing and Programming Solutions, Inc. (OP²S), he has managed the development of many tools for creating and viewing training material. Steve takes advantage of the Internet and computer technology to work from home—a 10-acre horse ranch on the Olympic Peninsula. When not working on technology products, he and his wife Gale spend their time working on the property, training and riding horses, and picking up horse poop.

John Pierce

John Pierce worked at Microsoft Corporation for 12 years as a technical editor and writer. He is the author or co-author of several books, such as *2007 Microsoft Office System Inside Out*, *Microsoft Office Access 2003 Inside Track*, *Microsoft Small Business Kit,* and other books from Microsoft Press. John can be reached at *jpierce@flyingspress.com*.

Joan Preppernau

Joan has worked in the training and certification industry for 10 years. As President of OTSI, she is responsible for guiding the translation of technical information and requirements into useful, relevant, and measurable training, learning, and certification deliverables. Joan is a Microsoft Certified Professional and Microsoft Certified Application Specialist, and the author or co-author of more than a dozen books about Windows and the Microsoft Office system. Joan has lived and worked in New Zealand, Sweden, Denmark, and various locations in the U.S. during the past 16 years. Having finally discovered the delights of a daily dose of sunshine, Joan is now happily ensconced in America's Finest City—San Diego, California—with her husband Barry and their daughter Trinity.

Online Training Solutions, Inc. (OTSI)

OTSI specializes in the design, creation, and production of Office and Windows training products for information workers and home computer users. For more information about OTSI, visit

www.otsi.com

Quick Reference

Part I Microsoft Office Word 2007

1 Exploring Word 2007

To start Word

➜ On the **Start** menu, click **All Programs**, click **Microsoft Office**, and then click **Microsoft Office Word 2007**.

To open an existing file

➜ On the **Office** menu, click **Open**. In the **Open** dialog box, navigate to the folder that contains the file you want to open, and then double-click the file.

To move the insertion point to the beginning or end of the document

➜ Press Ctrl+Home or Ctrl+End.

To convert a document created in an earlier version of Word

➜ On the **Office** menu, click **Convert**.

To view multiple pages

➜ On the **View** toolbar, click the **Zoom** button. In the **Zoom** dialog box, click the **Many pages** arrow, select the number of pages, and then click **OK**.

To adjust the magnification of a document

➜ On the **View** toolbar, click the **Zoom** button. In the **Zoom** dialog box, click a **Zoom to** percentage or type an amount in the **Percent** box, and then click **OK**.

To display the Document Map

➜ On the **View** tab, in the **Show/Hide** group, select the **Document Map** check box.

To display thumbnails of pages

➜ On the **View** tab, in the **Show/Hide** group, select the **Thumbnails** check box.

To display or hide non-printing characters

➜ On the **Home** tab, in the **Paragraph** group, click the **Show/Hide ¶** button.

To display a document in a different view

- On the **View** tab, in the **Document Views** group, click the button for the desired view.
- Click a view button on the **View** toolbar at the right end of the status bar.

To switch among open documents

→ On the **View** tab, in the **Window** group, click the **Switch Windows** button, and then click the name of the document you want to switch to.

To view multiple open documents

→ On the **View** tab, in the **Window** group, click the **Arrange All** button.

To open a new document

→ On the **Office** menu, click **New**, and then in the **New Document** window, double-click **Blank document**.

To save a document for the first time

1. On the **Quick Access Toolbar**, click the **Save** button; or click **Save As** on the **Office** menu.
2. Navigate to the location where you want to save the file, type a name for the document in the **File name** box, and then click **Save**.

To create a new folder while saving a document

1. In the **Save As** dialog box, click the **New Folder** button.
2. Type the name of the new folder, press Enter, and then click **Open**.

To preview how a document will look when printed

→ On the **Office** menu, point to **Print**, and then click **Print Preview**.

To print a document with the default settings

→ On the **Office** menu, point to **Print**, and then click **Quick Print**.

To print a document with custom settings

→ On the **Office** menu, click **Print**. Modify the print settings as needed, and click **OK**.

2 Editing and Proofreading Documents

To select text

- Word: Double-click the word.
- Sentence: Click in the sentence while holding down the Ctrl key.
- Paragraph: Triple-click in the paragraph, or double-click in the selection area to the left of the paragraph.
- Block: Click to the left of the first word, hold down the Shift key, and then click immediately to the right of the last word or punctuation mark.
- Line: Click in the selection area to the left of the line.
- Document: Triple-click in the selection area.

To delete selected text

➜ Press Del or Backspace.

To copy or cut and paste selected text

1. On the **Home** tab, in the **Clipboard** group, click the **Copy** or **Cut** button.
2. Click where you want to paste the text, and then in the **Clipboard** group, click the **Paste** button.

To undo an action

➜ On the **Quick Access Toolbar**, click the **Undo** button.

To save selected text as a building block

1. On the **Insert** tab, in the **Text** group, click the **Quick Parts** button, and then click **Save Selection to Quick Part Gallery**.
2. In the **Create New Building Block** dialog box, type a name for the building block, make any necessary changes to the settings, and then click **OK**.

To insert a building block in a document

- Click where you want to insert the building block. Then either type the name of the building block, and press F3.
- On the **Insert** tab, in the **Text** group, click the **Quick Parts** button, and select the building block from the **Quick Part** gallery.

To insert the date and time

1. Click where you want the date or time to appear, and then on the **Insert** tab, in the **Text** group, click the **Date & Time** button.
2. In the **Date and Time** dialog box, under **Available formats**, click the format you want, and then click **OK**.

To use the Thesaurus

1. Double-click the word you want to replace, and then on the **Review** tab, in the **Proofing** group, click the **Thesaurus** button.
2. In the **Research** task pane, point to the word you want to insert in place of the selected word, click the arrow that appears, and then click **Insert**.

To research information

1. On the **Review** tab, in the **Proofing** group, click **Research**.
2. In the **Research** task pane, in the **Search for** box, type the research topic.
3. Click the arrow of the box below the **Search for** box, click the resource you want to use, and then in the results list, click a source to view its information.

To translate a selected word or phrase into another language

1. On the **Review** tab, in the **Proofing** group, click the **Translate** button.
2. In the **Translation** area of the **Research** task pane, select the desired languages in the **From** and **To** boxes to display the translation.

To display a document in Outline view

➜ On the **View** toolbar, click the **Outline** button.

To display specific heading levels in Outline view

➜ On the **Outlining** tab, in the **Outline Tools** group, click the **Show Level** arrow, and then in the list, click a heading level.

To collapse or expand heading levels in Outline view

➜ Click anywhere in the heading to be collapsed or expanded. Then on the **Outlining** tab, in the **Outline Tools** group, click the **Collapse** or **Expand** button.

To demote or promote headings in Outline view

➜ Click the heading to be demoted or promoted. Then on the **Outlining** tab, in the **Outline Tools** group, click the **Demote** or **Promote** button.

To move content in Outline view

➜ Collapse the heading whose text you want to move. Then on the **Outlining** tab, in the **Outline Tools** group, click the **Move Up** or **Move Down** button.

To find text

1. On the **Home** tab, in the **Editing** group, click the **Find** button.
2. On the **Find** tab of the **Find and Replace** dialog box, specify the text you want to find, and then click **Find Next**.

To replace text

1. On the **Home** tab, in the **Editing** group, click the **Replace** button.
2. On the **Replace** tab of the **Find and Replace** dialog box, specify the text you want to find and the text you want to replace it with, and then click **Find Next**.
3. Click **Replace** to replace the first instance of the text, **Replace All** to replace all instances, or **Find Next** to leave that instance unchanged and move to the next one.

To check spelling and grammar

1. On the **Review** tab, in the **Proofing** group, click the **Spelling & Grammar** button.
2. In the **Spelling and Grammar** dialog box, click the appropriate buttons to correct the errors Word finds or to add words to the custom dictionary or AutoCorrect list.

To remove personal information from a document

1. On the **Office** menu, point to **Prepare**, and then click **Inspect Document**.
2. In the **Document Inspector** dialog box, select the items you want checked, and then click **Inspect**.
3. In the **Document Inspector** summary, click the **Remove All** button to the right of any items you want removed, and then close the **Document Inspector** dialog box.

To mark a document as final

1. On the **Office** menu, point to **Prepare**, and then click **Mark as Final**.
2. Click **OK** in the message box, click **Save**, and then click **OK** in the finalization message.

3 Changing the Look of Text

To preview and apply styles to selected text

➜ On the **Home** tab, in the **Styles** group, display the **Styles** gallery, point to the thumbnail of the style you want to preview, and then click the thumbnail of the style you want to apply.

To change the style set

➜ On the **Home** tab, in the **Styles** group, click the **Change Styles** button, click **Style Set**, and then click the set you want to use.

To apply character formatting to selected text

➜ On the **Home** tab, in the **Font** group (or on the **Mini toolbar** that appears), click the button of the formatting you want to apply.

To copy formatting of selected text

➜ On the **Home** tab, in the **Clipboard** group (or on the **Mini toolbar** that appears), click the **Format Painter** button, and select the text to which you want to apply the copied formatting.

To clear formatting from selected text

➜ On the **Home** tab, in the **Font** group, click the **Clear Formatting** button.

To change the font of selected text

➜ On the **Home** tab, in the **Font** group, click the **Font** arrow, and then in the list, click the font you want.

To change the font size of selected text

➜ On the **Home** tab, in the **Font** group, click the **Font Size** arrow, and then in the list, click the font size you want.

To apply text effects to selected text

1. On the **Home** tab, click the **Font** Dialog Box Launcher.
2. In the **Font** dialog box, under **Effects**, select the check box for the effect you want, and then click **OK**.

To change the color of selected text

➜ On the **Home** tab, in the **Font** group, click the **Font Color** arrow, and in the color palette, click the color you want.

To highlight selected text with a color

➜ On the **Home** tab, in the **Font** group, click the **Highlight** arrow, and click the color you want.

To select all text with the same formatting

➜ Click the formatted text. Then on the **Home** tab, in the **Editing** group, click the **Select** button, and click **Select Text With Similar Formatting**.

To insert a line break

➜ Click at the right end of the text where you want the line break to appear. Then on the **Page Layout** tab, in the **Page Setup** group, click the **Breaks** button, and click **Text Wrapping**.

To align paragraphs

➜ Click the paragraph, or select multiple paragraphs. Then on the **Home** tab, in the **Paragraph** group, click the **Align Left**, **Center**, **Align Right**, or **Justify** button.

To indent the first line of a paragraph

➜ Click the paragraph. Then on the horizontal ruler, drag the **First Line Indent** marker to the location of the indent.

To indent an entire paragraph

➜ Click the paragraph, or select multiple paragraphs. Then on the horizontal ruler, drag the **Left Indent** or **Right Indent** marker to the location of the indent.

To increase or decrease indenting

➜ Click the paragraph, or select multiple paragraphs. Then in the **Paragraph** group, click the **Increase Indent** or **Decrease Indent** button.

To set a tab stop

➜ Click the paragraph, or select multiple paragraphs. Then click the **Tab** button until it displays the type of tab you want, and click the horizontal ruler where you want to set the tab stop for the selected paragraph(s).

To change the position of a tab stop

➜ Click the paragraph, or select multiple paragraphs. Then on the horizontal ruler, drag the tab stop to the new mark.

To add a border or shading to a selected paragraph

1. On the **Home** tab, in the **Paragraph** group, click the **Borders and Shading** arrow, and click **Borders and Shading**.
2. In the **Borders and Shading** dialog box, on the **Borders** tab, click the icon of the border style you want to apply, and then click **OK**.
3. In the **Borders and Shading** dialog box, on the **Shading** tab, click the **Fill** arrow, click the shading color you want, and then click **OK**.

To format selected paragraphs as a list

➜ On the **Home** tab, in the **Paragraph** group, click the **Bullets** or **Numbering** button.

To change the style of selected list paragraphs

1. On the **Home** tab, in the **Paragraph** group, click the **Bullets** or **Numbering** arrow.
2. In the **Bullets Library** or **Numbering Library**, click the bullet or number style you want to use.

To change the indent level of selected list paragraphs

➜ On the **Home** tab, in the **Paragraph** group, click the **Decrease Indent** or **Increase Indent** button.

To sort items in a selected list

1. On the **Home** tab, in the **Paragraph** group, click the **Sort** button.
2. In the **Sort Text** dialog box, in the **Type** list, click the type of text by which to sort.
3. Select **Ascending** or **Descending**, and then click **OK**.

To create a multilevel list

1. Click where you want to create the list. Then on the **Home** tab, in the **Paragraph** group, click the **Multilevel List** button.
2. In the **Multilevel List** gallery, click the thumbnail of the multilevel list style you want to use.
3. Type the text of the list, pressing Enter to create another item at the same level, pressing Enter and then Tab to create a subordinate item, or pressing Enter and then Shift+Tab to create a higher-level item.

4 Presenting Information in Columns and Tables

To format selected text in multiple columns

→ On the **Page Layout** tab, in the **Page Setup** group, click the **Columns** button, and click the number of columns you want.

To change the width or spacing of columns

1. Click anywhere in the column you want to change. Then on the **Page Layout** tab, in the **Page Setup** group, click the **Columns** button, and then click **More Columns**.
2. In the **Columns** dialog box, under **Width and spacing**, change the setting in the **Width** column or the **Spacing** column, and then click **OK**.

To hyphenate text automatically

→ On the **Page Layout** tab, in the **Page Setup** group, click the **Hyphenation** button, and then click **Automatic**.

To insert a column break

→ On the **Page Layout** tab, in the **Page Setup** group, click the **Breaks** button, and then click **Column**.

To create a tabular list

1. Type the text of the list, pressing Tab between each item on a line and pressing Enter at the end of each line.
2. Select the lines of the list, change the **Tab** button to the type of tab stop you want, and then click the horizontal ruler where you want to set tab stops that will line up the items in columns.

To insert a table

1. On the **Insert** tab, in the **Tables** group, click the **Table** button.
2. In the grid, point to the upper-left cell, move the pointer across and down to select the number of columns and rows you want, and click the lower-right cell in the selection.

To add rows to a table

- Click the row above or below which you want to add a row, and then on the **Layout** tab, in the **Rows & Columns** group, click the **Insert Above** or **Insert Below** button.
- Select the number of rows you want to insert, and then in the **Rows & Columns** group, click the **Insert Above** or **Insert Below** button.

To merge selected table cells

➜ On the **Layout** contextual tab, in the **Merge** group, click the **Merge Cells** button.

To convert selected text to a table

1. On the **Insert** tab, in the **Tables** group, click the **Table** button, and then click **Convert Text to Table**.
2. In the **Convert Text to Table** dialog box, enter the dimensions of the table in the **Number of columns** and **Number of Rows** boxes, select the type of text separator, and then click **OK**.

To insert a Quick Table

1. Click where you want to insert the table. Then on the **Insert** tab, in the **Tables** group, click the **Table** button, and then point to **Quick Tables**.
2. In the **Quick Tables** gallery, click the table style you want.

To apply a table style

➜ Click the table whose style you want to change. Then on the **Design** contextual tab, in the **Table Styles** group, click the style you want in the **Table Styles** gallery.

To total a column of values in a table

1. Click the cell in the table where you want the total to appear.
2. On the **Layout** contextual tab, in the **Data** group, click the **Formula** button.
3. With the SUM formula in the **Formula** box, click **OK** to total the values.

To draw a table

1. Click where you want to draw the table. Then on the **Insert** tab, in the **Tables** group, click the **Table** button, and then click **Draw Table**.
2. Drag the pointer (which has become a pencil) across and down to create a cell.
3. Point to the upper-right corner of the cell, and drag to create another cell, or draw column and row boundaries inside the first cell.

To insert an Excel worksheet

- Click where you want to insert the worksheet, and then on the **Insert** tab, in the **Tables** group, click the **Table** button, and click **Excel Spreadsheet.**
- Copy the worksheet data in Excel, and then in Word, click where you want to insert the copied data, and on the **Home** tab, in the **Clipboard** group, click the **Paste** button.

  or

1. In Excel, copy the worksheet data. Then in Word, click where you want to insert the copied data, and on the **Home** tab, in the **Clipboard** group, click the **Paste** arrow, and click **Paste Special**.
2. In the **Paste Special** dialog box, in the **As** list, click **Microsoft Office Excel Worksheet Object**, click **Paste link**, and then click **OK**.

Part II Microsoft Office Excel 2007

5 Setting Up a Workbook

To open a workbook

1. On the **Office** menu, click **Open**.
2. Navigate to the workbook you want to open, and then click **Open**.

To create a new workbook

➜ On the **Office** menu, click **New**, and then click **Blank Workbook**.

To save a workbook

1. On the **Quick Access Toolbar**, click the **Save** button.
2. Type a name for the file, and then click **Save**.

To set file properties

1. On the **Office** menu, point to **Finish**, and then click **Properties**.
2. Add information describing your file.

To define custom properties

1. On the **Office** menu, point to **Finish**, and then click **Properties**.
2. In the **Property Views and Options** list, click **Advanced**.
3. On the **Custom** tab, type a property name, select the type of data contained in the property, and type a value for the property.
4. Click **Add**, and then click **OK**.

To display a worksheet

➜ Click the sheet tab of the worksheet you want to display.

To create a new worksheet

➜ Right-click the sheet tab of the worksheet that follows the location where you want to insert a worksheet, click **Insert**, and then double-click **Worksheet**.

To change the order of worksheets in a workbook

➜ Drag the sheet tab of the worksheet you want to move.

To copy a worksheet to another workbook

1. Open the target workbook, and then switch to the source workbook.
2. Hold down the Ctrl key, and click the sheet tabs of the worksheets you want to copy.
3. Right-click the selection, and then click **Move Or Copy**.
4. Select the **Create A Copy** check box. In the **To Book** list, click the workbook to which you want to copy the worksheet(s). Then click **OK**.

To rename a worksheet

1. Double-click the sheet tab of the worksheet you want to rename.
2. Type the new name of the worksheet, and then press Enter.

To hide a worksheet

1. Hold down the Ctrl key, and then click the sheet tabs of the worksheets you want to hide.
2. Right-click any selected worksheet tab, and then click **Hide**.

To unhide a worksheet

1. Right-click any worksheet tab, and then click **Unhide**.
2. Click the worksheet you want to unhide, and then click **OK**.

To delete a worksheet

1. Hold down the Ctrl key, and then click the sheet tabs of the worksheets you want to delete.
2. Right-click the selection, and then click **Delete**.

To change a row's height or column's width

1. Select the rows and columns you want to resize.
2. Drag a row or column border until it is the desired size.

To insert a column or row

➜ Right-click the column header to the right of, or the row header below, where you want the new column or row to appear, and then click **Insert**.

To delete a selected column or row

➜ Right-click the column or row, and then click **Delete**.

To hide a selected column or row

➜ Right-click the column or row, and then click **Hide**.

To unhide a column or row

1. Click the row or column header of the row above or the column to the left of the rows or columns you want to unhide.
2. Hold down the Shift key, and click the row or column header of the row or column below or to the right of the rows or columns you want to unhide.
3. Right-click the selection, and then click **Unhide**.

To insert a cell

1. Select the cells in the location where you want to insert new cells.
2. On the **Home** tab, in the **Cells** group, click the **Insert** arrow, and then in the list, click **Insert Cells**.
3. Click the option representing how you want to move the existing cells to make room for the inserted cells, and then click **OK**.

To delete selected cells

1. On the **Home** tab, in the **Cells** group, in the **Delete** list, click **Delete Cells**.
2. Click the option representing how you want the remaining cells to fill the deleted space, and then click **OK**.

To zoom in or out on a worksheet

- Click the **Zoom In** control to make your window's contents 10 percent larger per click.
- Click the **Zoom Out** control to make your window's contents 10 percent smaller per click.
- Drag the **Zoom** slider control to the left to zoom out, or to the right to zoom in.

To zoom in or out to a specific zoom level

1. On the **View** tab, in the **Zoom** group, click **Zoom**.
2. Click **Custom**, type a new zoom level in the **Custom** field, and then click **OK**.

To change to another open workbook

1. On the **View** tab, in the **Window** group, click **Switch Windows**.
2. Click the name of the workbook you want to display.

To arrange all open workbooks in the program window

1. On the **View** tab, in the **Window** group, click **Arrange All**.
2. Select the arrangement you want, and then click **OK**.

To remove a button from the Quick Access Toolbar

➜ Right-click the button, and then click **Remove from Quick Access Toolbar**.

To add a button to the Quick Access Toolbar

1. Click the **Customize Quick Access Toolbar** button, and then click **More Commands**.
2. In the **Choose Commands From** list, click the command category you want.
3. Click the command you want to add, click **Add**, and then click **OK**.

To move a button on the Quick Access Toolbar

1. Click the **Customize Quick Access Toolbar** button, and then click **More Commands**.
2. Click the command you want to move.
3. Click the **Move Up** button or the **Move Down** button.

6 Working with Data and Data Tables

To enter a data series by using AutoFill

1. Type the first label or value for your list.
2. Drag the fill handle to the cell containing the last label or value in the series.

To change how dragging the fill handle extends a series

1. Type the first label or value for your list.
2. Hold down the Ctrl key, and drag the fill handle to the cell containing the last label or value in the series.

To enter data by using AutoComplete

1. Type the beginning of an entry.
2. Press Tab to accept the AutoComplete value.

To enter data by picking from a list

1. Right-click a cell in a column with existing values, and then click **Pick from Drop-down List**.
2. Click the item in the list you want to enter.

To copy and paste selected cells

1. On the **Home** tab, in the **Clipboard** group, click **Copy**.
2. Click the destination cells. Then in the **Clipboard** group, click **Paste**.

To copy and paste a selected row or column

1. On the **Home** tab, in the **Clipboard** group, click **Copy**.
2. Click the header of the row or column into which you want to paste the values. Then in the **Clipboard** group, click **Paste**.

To find data within a worksheet

1. On the **Home** tab, in the **Editing** group, click **Find and Select**, and then click **Find**.
2. Type the text you want to find, and then click **Find Next**.

To replace a value with another value within a worksheet

1. On the **Home** tab, in the **Editing** group, click **Find and Select**, and then click **Replace**.
2. Type the text you want to replace, and the text you want to take the place of the existing text.
3. Click **Find Next**. Follow any of these steps:
   - Click **Replace** to replace the text.
   - Click **Find Next** to skip this instance of the text and move to the next time it occurs.
   - Click **Replace All** to replace every instance of the text.

To edit a cell's contents by hand

1. Click the cell you want to edit.
2. In the **Formula Bar**, make the changes you want, and then press Enter.

To check spelling

1. On the **Review** tab, in the **Proofing** group, click **Spelling**. If you are asked whether you want to save your work, do so.
2. Follow any of these steps:
   - Click **Ignore Once** to ignore the current misspelling.
   - Click **Ignore All** to ignore all instances of the misspelled word.
   - Click **Add to Dictionary** to add the current word to the dictionary.
   - Click the correct spelling, and then click **Change** to replace the current misspelling with the correct word.
   - Click the correct spelling, and then click **Change All** to replace all instances of the current misspelling with the correct word.
   - Click **Cancel** to stop checking spelling.
3. Click **OK** to close the dialog box that appears after the spelling check is complete.

To look up a selected word in the Thesaurus

→ On the **Review** tab, in the **Proofing** group, click **Thesaurus**.

To translate a selected word to another language

→ On the **Review** tab, in the **Proofing** group, click **Translate**.

To create a data table

1. Click any cell in the range from which you want to create a table.
2. On the **Home** tab, in the **Styles** group, click **Format as Table**.
3. Click the table style you want, and verify that Excel identified the data range correctly.
4. If your table has headers, select the **My table has headers** check box. Then click **OK**.

To add rows to a data table

- Click the cell in the lower-right corner of the data table, and then press Tab to create a new table row.
- Type data in the cell below the lower-left corner of the data table, and then press Tab.

To resize a table

➜ Click any cell in the table, and then drag the resize handle to expand or contract the table.

To add a Total row to a table

1. Click any cell in the table.
2. On the **Design** tab, in the **Table Style Options** group, click **Total Row**.

To change the Total row summary function

➜ Click any cell in the table's **Total** row, click the arrow that appears, and then click the desired summary function.

To rename a table

1. Click any cell in the table.
2. On the **Design** tab, in the **Properties** group, type a new value in the **Table Name** box.

7 Performing Calculations on Data

To create a named range from selected cells

1. On the **Formula Bar**, click the **Name Box**.
2. Type the name you want for the range, and then press Enter.

To create a named range from a selection including the name

1. Select the cells you want to name as a range. Be sure either the first or last cell contains the name for the range.
2. On the **Formulas** tab, in the **Defined Names** group, click **Create from Selection**.
3. Select the check box for the cell that contains the name you want. Then click **OK**.

To display the Name Manager

→ On the **Formulas** tab, in the **Defined Names** group, click **Name Manager**.

To edit a named range

1. On the **Formulas** tab, in the **Defined Names** group, click **Name Manager**.
2. Click the named range you want to edit, and then click the **Edit** button.
3. Click the **Collapse Dialog** button, select the cells you want in the range, and then click **Close**.

To create a formula

1. Click the cell into which you want to enter a formula.
2. Type =.
3. Type the expression representing the calculation you want to perform.
4. Press Enter.

To create a formula by using the Insert Function dialog box

1. On the **Formulas** tab, in the **Function Library** group, click **Insert Function**.
2. Select the function you want to use, and then click **OK**.
3. Fill in the **Function Arguments** dialog box, and then click **OK**.

To refer to a table column or row in a formula

1. Click the cell in which you want to create the formula.
2. Type =, followed by the function to include in the formula and a left parenthesis; for example, =SUM(.
3. Move the mouse pointer over the header of the table column you want to use in the formula. When the mouse pointer changes to a black, downward-pointing arrow, click the column header.
4. Type a right parenthesis, and then press Enter.

To create a formula that doesn't change when copied between cells

→ Precede all column and row references with a dollar sign; for example, $C$4.

To create a conditional formula

1. Click the cell in which you want to enter an IF function.
2. On the **Formulas** tab, in the **Function Library** group, click **Logical**, and then click **IF**.
3. Type a conditional statement that evaluates to true or false. Type the text you want to appear if the condition is true, and the text you want to appear if the condition is false. Then click **OK**.

To display cells that provide values for a formula

1. Click the cell you want to track.
2. On the **Formulas** tab, in the **Formula Auditing** group, click the **Trace Precedents** button.

To display formulas that use a cell's contents

1. Click the cell you want to track.
2. On the **Formulas** tab, in the **Formula Auditing** group, click the **Trace Dependents** button.

To remove tracer arrows

1. Click the cell you want to track.
2. On the **Formulas** tab, in the **Formula Auditing** group, click the **Remove Arrows** button.

To locate errors in a worksheet

1. On the **Formulas** tab, in the **Formula Auditing** group, click the **Error Checking** button.
2. Click the **Edit in Formula Bar** button.
3. Edit the formula.
4. Click the **Next** button to view the next error.

To step through a formula to locate an error

1. Click the cell with the formula you want to evaluate.
2. On the **Formulas** tab, in the **Formula Auditing** group, click **Evaluate Formula**.
3. Click **Evaluate** (one or more times) to move through the formula's elements.

To watch a value in a cell

1. On the **Formulas** tab, in the **Formula Auditing** group, click **Watch Window**.
2. Click **Add Watch,** select the cells you want to watch, and then click **Add**.
3. Click **Watch Window**.

To delete a watch

1. On the **Formulas** tab, in the **Formula Auditing** group, click **Watch Window**.
2. Click the watch you want to delete, and then click **Delete Watch**.

8 Changing Workbook Appearance

To change a cell's font, font style, font color, or background color

1. Select the cells you want to change.
2. On the **Home** tab, use the controls in the **Font** group to format the cells.

To add a border to a selected cell or cells

➜ On the **Home** tab, in the **Font** group, click the **Border** arrow, and then in the list, click the type of border you want to apply.

To apply a style to a selected cell or cells

1. On the **Home** tab, in the **Styles** group, click **Cell Styles**.
2. Click a style.

To create a new style

1. On the **Home** tab, in the **Styles** group, click **Cell Styles**.
2. Click **New Cell Style**, and then type a new style name.
3. Click **Format**, specify the formatting you want the style to apply, and click **OK** twice.

To delete a style

1. On the **Home** tab, in the **Styles** group, click **Cell Styles**.
2. Right-click the style you want to delete, and then click **Delete**.

To copy a cell's formatting onto another cell

1. Click the cell that contains the format you want to apply to another cell.
2. On the **Home** tab, in the **Clipboard** group, click the **Format Painter** button.
3. Select the cells to which you want to apply the formatting.

To change theme fonts, colors, and graphic effects

➜ On the **Page Layout** tab, in the **Themes** group, do the following:

- Click the **Fonts** button, and then select a new font.
- Click the **Colors** button, and then select a new color set.
- Click the **Effects** button, and then select a new default effect.

To apply a workbook theme

1. On the **Page Layout** tab, in the **Themes** group, click **Themes**.
2. Click the theme you want to apply.

To save a workbook's format as a new theme

1. Format your worksheet using the colors, fonts, and effects you want to include in your theme.
2. On the **Page Layout** tab, in the **Themes** group, click **Themes**.
3. Click **Save Current Theme**.
4. Type a name for your theme.
5. Click **Save**.

To create a new table style

1. On the **Home** tab, in the **Styles** group, click **Format as Table**, and then click **New Table Style**.
2. In the **Name** field, type a name for the table style.
3. In the **Table Element** list, click the element you want to format.
4. Click **Format**, and use the controls in the **Format** dialog box to format the table element. Then click **OK**.
5. Repeat as desired to format other elements, and then click **OK**.

To format a cell value as a phone number

1. On the **Home** tab, click the **Number** Dialog Box Launcher.
2. Click **Special**, click **Phone Number**, and then click **OK**.

To format cell data as a currency value

➜ On the **Home** tab, in the **Number** group, click the **Accounting Number Format** button.

To select a foreign currency symbol

➜ On the **Home** tab, in the **Number** group, click the **Accounting Number Format** arrow, and then in the list, click the currency symbol you want to apply.

To add words to a cell's value

1. On the **Home** tab, click the **Number** Dialog Box Launcher.
2. Click **Custom**, and then click the format to serve as the base for your custom format.
3. Type the text to appear in the cell, enclosed in quotes (for example, "cases"), and then click **OK**.

To apply a conditional format to selected cells

1. On the **Home** tab, in the **Styles** group, click **Conditional Formatting**.
2. Click **New Rule**.
3. Click **Format Only Cells That Contain**. In the **Comparison Phrase** list, click the comparison phrase you want. Then type the constant values or formulas you want evaluated.
4. Click **Format**, specify the formatting you want, and then click **OK** twice.

To edit a conditional formatting rule

1. Select the cells that contain the rule you want to edit.
2. On the **Home** tab, in the **Styles** group, click **Conditional Formatting**.
3. Click **Manage Rules**, click the rule you want to change, and then click **Edit Rule**.
4. Make your changes, and then click **OK** twice to save them.

To delete a conditional formatting rule

1. Select the cells that contain the rule you want to delete.
2. On the **Home** tab, in the **Styles** group, click **Conditional Formatting**.
3. Click **Manage Rules**, click the rule you want to delete, click **Delete Rule**, and then click **OK**.

To display data bars in selected cells

1. On the **Home** tab, in the **Styles** group, click **Conditional Formatting**.
2. Point to **Data Bars**, and then click the data bar option you want to apply.

To display a color scale in selected cells

1. On the **Home** tab, in the **Styles** group, click **Conditional Formatting**.
2. Point to **Color Scales**, and then click the color scale pattern you want to apply.

To display icon sets in selected cells

1. On the **Home** tab, in the **Styles** group, click **Conditional Formatting**.
2. Point to **Icon Sets**, and then click the icon set you want to apply.

To add a picture to a worksheet

1. On the **Insert** tab, in the **Illustrations** group, click **Picture**.
2. Navigate to and double-click the picture you want to insert.

To change thea selected picture's characteristics

➜ Use the controls on the **Format** tab to edit the picture.

Part III Microsoft Office Access 2007

9 Creating a Database

To open a template and save it as a new database

1. On the **Getting Started with Microsoft Office Access** page, in the **Template Categories** list, click a category.
2. Click the template icon for the template you want to open.
3. In the **File Name** box, type a new name for the database, and note the default path.
4. Click the **Create** button.

To open a new blank database

1. Open Access.
2. On the **Getting Started with Microsoft Access** page, click **Blank Database**.
3. In the **File Name** box, type the name for the database.
4. Click the **Browse for a location** button, browse to the folder where you want to save the database, click **OK**, and then click **Create**.

To enter information in a database

➜ Click in an empty cell, type your text, and then press Tab to move to the next cell.

To change a field name

➜ Double-click the field name, and then type the new name.

To change the data type of a field

➜ In Design view, click in the data type cell you want to change, click the arrow that is displayed, and then click the data type you want to use.

To change the size of a field

1. In Design view, click the field name.
2. In the **Field Properties** area, select the current field size, and then enter the new field size.

To close and save a table

➜ Click the **Close** button to close the table, and then click **Yes** to save changes.

To create a table by using a template

➜ On the **Create** tab, in the **Tables** group, click the **Table Templates** button, and then click the type of template you want to create.

To add a new field name to a table and assign it a data type

1. Click in the first blank **Field** Name cell below the existing field names, type the field name, and then press Tab.
2. Click the **Data Type** arrow for the new field, and then click the data type that you want assigned to the field.

To delete a table row while in Design view

➜ Right-click in the row you want to delete, and then click **Delete Rows**.

To edit a field name

➜ Select the part of the field name you want to edit, and then type the new information.

To change the size of a table column

1. With the table in **Datasheet View**, drag the vertical bar at the right edge of a column header to the left or right until the column is the size you want.
2. To size a column to the minimum width that will display all the text in that field in all records, point to the vertical bar on the right of the column header, and when the pointer changes to a double-headed arrow, double-click.

To change the height of all rows in a table

➜ With the table in **Datasheet View**, on the left side of the datasheet, drag the horizontal bar between any two record selectors up or down until the rows are the height you want.

To reset all rows in a table to standard height

1. With the table in **Datasheet View**, on the **Home** tab, in the **Records** group, click **More**, and then click **Row Height** to display the **Row Height** dialog box.
2. In the **Row Height** dialog box, select the **Standard Height** check box or type in the height you want in the **Row Height** box, and then click **OK**.

To hide and unhide columns

1. Click anywhere in the column you want to hide, and in the **Records** group, click **More**. Then click **Hide Columns**.
2. To restore the hidden column, click **More** again, and then click **Unhide Columns** to display the **Unhide Columns** dialog box.
3. In the **Unhide Columns** dialog box, select the check box of the column you want to unhide, and then click **Close**.

To freeze and unfreeze columns

1. Drag through the column header of the column or columns you want to freeze.
2. With the columns selected, click the **More** button, and then click **Freeze**.
3. To restore the columns to their normal condition, click **More**, and then click **Unfreeze**.

10 Simplifying Data Entry by Using Forms

To create a form based on a table by using the Form tool

1. Open the table on which you want to base the form.
2. On the **Create** tab, in the **Forms** group, click the **Form** button.

To move labels on a form

➜ Select the labels to be moved by dragging through them, drag them to a blank section of the form, and then release the selection.

To change the font and font size of a label on a form

1. Open the form in Design view, and click the label (not its text box) you want to change.
2. On the **Design** contextual tab, in the **Font** group, click the **Font** arrow, and then in the list, click the font you want to use.
3. With the label still selected, click the **Font Size** arrow, and then in the list, click the size you want.

To edit form control properties by using the Property Sheet pane

1. Open the form in Design view, and if the **Property Sheet** pane is not visible, right-click the desired control, and then click **Properties**.
2. In the **Property Sheet** pane, click the property you want to change, and either type the new value, or click the down arrow and select the value you want. Repeat for all properties that you want to change.

To edit multiple form control properties at once

1. Click anywhere in the **Detail** section of the form, and then drag diagonally to draw a rectangle through some portion of all the controls to select them.
2. In the **Property Sheet** pane, click the property you want to change, click the arrow that appears, and then click the option you want. Repeat for all properties that you want to change.

To set the background properties of all controls on a form

1. Select all the controls on the form. Then on the **Format** tab of the **Property Sheet** pane, click **Back Style**, and set it to the option you want.
2. Click **Back Color**, and then click the **Build** button.
3. In the **Color Builder**, click the square of the color you want.
4. Set the **Special Effect** property to the option you want, and the **Border Color** property to the color you want.

To edit the caption of a form control

→ Click the label whose caption you want to change. Then in the **Property Sheet** pane, click the **Caption** property, change the text to what you want, and press Enter.

To change the layout of controls on a form

→ Drag through all the controls on the form to select them. Then on the **Arrange** tab, in the **Control Layout** group, click the **Remove** button.

To delete a form control label

→ Click the label you want to delete, and then press the Del key.

To select specific control labels on a form

→ Hold down the Shift key as you click each control or drag through just the labels you want to select.

To align form controls

→ Select the labels (but not their corresponding text boxes), and then in the **Property Sheet** pane, set the **Text Align** property to the alignment you want.

To size form control labels to fit their contents

→ Select the labels to be sized, and then on the **Arrange** contextual tab, in the **Size** group, click the **Size To Fit** button.

To insert space between form control labels and text boxes

→ Select all the text boxes (but not their corresponding labels). Then in the **Property Sheet** pane, click the **Left** property, and then change the setting to the amount of space you want.

To save the design of a form

→ On the **Quick Access Toolbar**, click the **Save** button.

To expand the Detail area of a form

→ Point to the right edge of the form **Detail** grid, and when the pointer changes to a double-headed arrow, drag the edge of the background to the right.

To move a label or text box control on a form

➜ Click a label or text box, move the pointer over its border, and when the pointer changes to a four-way arrow, drag it to a new location.

To create an AutoFormat form template

1. On the **Arrange** contextual tab, in the **AutoFormat** group, click the **AutoFormat** button.
2. At the bottom of the **AutoFormat** gallery, click **AutoFormat Wizard**.
3. In the **AutoFormat** dialog box, click the **Customize** button.
4. In the **Customize AutoFormat** dialog box, click **Create a new AutoFormat based on the Form**, and then click **OK**.
5. In the **New Style Name** dialog box, type a name for the new style, and then click **OK**.
6. Click **OK** to close the **AutoFormat** dialog box. Then click the **Save** button, and close the form.

To add a graphic to a form control

1. In the **Navigation Pane**, under **Forms**, right-click the form you want to use, and then click **Design View**.
2. On the **Design** contextual tab, in the **Controls** group, click the **Image** button, and then click the area where you want to place the image, drag diagonally to draw a rectangle, and release the mouse button.
3. In the **Insert Picture** dialog box, navigate to the folder where the graphic you want to use is located, and then double-click the graphic.

To add a caption below a picture

1. In the **Controls** group, click the **Label** button, and then drag diagonally to draw a rectangle where you want it to appear.
2. In the active label control, type the caption text, and then press Enter.

To size a label control to fit the text

➜ Click the label control, and then on the **Arrange** tab, in the **Size** group, click the **Size to Fit** button.

To add a combo box control without using a wizard

1. On the **Design** tab, in the **Controls** group, look at the **Use Control Wizards** button. If the button is active (orange), click it to deactivate it.
2. In the **Controls** group, click the **Combo Box** button, and then drag diagonally in the form to draw a rectangle where you want the combo box to appear.

To copy the formatting of one control to another

➜ Click the box whose formatting you want to copy, and in the **Font** group, click the **Format Painter** button. Then click the box to which you want to apply the formatting.

To remove the record selector and scroll bar controls from a form

1. In Design view, click the **Form** selector (the box at the junction of the horizontal and vertical rulers), and then press F4 to display the **Property Sheet** pane for the entire form (if the sheet is not already displayed).
2. On the **Format** tab, change **Record Selectors** to **No**, and **Scroll Bars** to **Neither**.

To create a form based on the fields in a table by using the Form wizard

1. In the **Navigation Pane**, under **Tables**, click the table in which you want to create the AutoForm.
2. On the **Create** tab, in the **Forms** group, click the **More Forms** button, and then in the list, click **Form Wizard**.
3. With the open table selected in the **Tables/Queries** list, click the **Move All** button to move all the table fields to the **Selected Fields** list, and then click **Next**.
4. On the second page of the wizard, choose the layout of the fields in the new form. On the third page, select a style option.
5. On the fourth page, with **Open the form to view or enter information** selected, click **Finish**.

To create a form and subform simultaneously

1. On the **Create** tab, in the **Forms** group, click the **More Forms** button, and then click **Form Wizard**.
2. On the first page of the **Form** wizard, in the **Tables/Queries** list, click the table on which you want to base the form. Then click the **Move All** button to include all the table fields in the new form.
3. To create the subform, display the **Tables/Queries** list, and then click the table on which you want to base the subform.
4. In the **Available Fields** list, double-click the fields you want to include in the subform to move them to the **Selected fields** list, and then click **Next**.
5. With your primary table and **Form with subform(s)** selected, click **Next**.
6. With **Datasheet** selected, click **Next**.
7. On the last page of the wizard, select a style, and then click **Finish**.

To add a subform to a form

1. Open the form in Design view. Then on the **Design** tab, in the **Controls** group, make sure the **Use Control Wizards** button is active (orange).
2. In the **Controls** group, click the **Subform/Subreport** button, and then drag diagonally to draw a rectangle in a section where you want to put the subform.
3. On the **Subform** wizard's first page, with **Use existing Tables and Queries** selected, click **Next**.
4. In the **Tables/Queries** list, click the type of item you want to use.
5. Add fields to the **Selected Fields** list by double-clicking each field. Then click **Next**, select the options you want, and click **Finish**.

11 Locating Specific Information

To sort information in one column

- Click the arrow at the right side of the column header for the column you want to sort, and then click the direction you want to sort the information.
- Click the header of the column you want to sort, and then on the **Home** tab, in the **Sort and Filter** group, click the **Ascending** or **Descending** button.

To sort information in multiple columns

➜ Select the adjacent columns you want to sort, right-click the column header area of your selection, and then click how you want to sort the columns.

To move a field

➜ Click the column head you want to move, and then drag it to the position you want.

To filter records by a single criterion

1. In the field, click any instance of the record you want to filter by.
2. On the **Home** tab, in the **Sort & Filter** group, click the **Selection** button, and then in the list, click **Equals** "***<the term you want to filter on>***".

To remove a filter

➜ In the **Sort & Filter** group, click the **Toggle Filter** button.

To filter records with a text filter

1. Click the column header arrow, point to **Text Filters**, and then click the criterion you want to filter by.
2. In the **Custom Filter** dialog box, in the **ItemText begins with** box, type the first few letters of the text you want to filter by. Then click **OK**.

To filter records with a "does not equal" filter

→ In the column, right-click any instance of the criterion you don't want to filter, and then click **Does Not Equal "<*the item you don't want to filter*>"**.

To use the Filter By Form command

1. In the **Navigation Pane**, under **Forms**, double-click the form you want to search.
2. On the **Home** tab, in the **Sort & Filter** group, click the **Advanced** button, and then in the list, click **Filter By Form**.
3. Click the box you want to search in, type the search criterion, and then press Enter.
4. In the **Sort and Filter** group, click the **Toggle Filter** button.

To use the Advanced Filter/Sort command to sort tables

1. On the **Home** tab, in the **Sort & Filter** group, click the **Advanced Filter Options** button, and then in the list, click **Advanced Filter/Sort**.
2. In the field list, double-click a field to copy it to the first cell in the first column of the design grid.
3. In the **Criteria** cell under the field you just copied, type the search criterion, and then press Enter.
4. Repeat Steps 2 and 3 for any other fields you want to filter on.
5. In the **Sort & Filter** group, click the **Toggle Filter** button to view the records that match the criteria.

To create a query in Design view

1. On the **Create** tab, in the **Other** group, click the **Query Design** button.
2. In the **Show Table** dialog box, on the **Tables** tab, double-click any tables you want to add to the query window. Then close the dialog box.
3. Drag the fields to be used in the query from the field lists to consecutive columns in the design grid.
4. On the **Design** contextual tab, in the **Results** group, click the **Run** button to run the query and display the results in Datasheet view.

12 Keeping Your Information Accurate

To set the data type for a field

1. With the table in Design view, click the **Data Type** cell next to the desired field.
2. Click the **Data Type** arrow, and then in the list, click the data type you want.

To view the properties of a field

➜ With the table in Design view, click the field name to display its properties in the Field Properties area.

To set the Field Size property for text, number, and autonumber fields

➜ With the table in Design view, click any cell in a field, and then in the **FieldProperties** area, change the **Field Size** property to what you want.

To use the Input Mask wizard

1. With the table in Design view, select a field, and then click **Input Mask** in the **Field Properties** area.
2. Click the **Build** button to the right of the cell to start the **Input Mask** wizard. (Click **Yes** if Access prompts you to install this feature.)
3. Select an available mask in the **Input Mask** list, and then click **Next**.
4. In the **Input Mask** and **Placeholder character** boxes, make any changes you want, and then click **Next**.
5. Choose whether to store the data with the symbols, and then click **Finish**.
6. Press Enter to accept the mask. Then save your changes.

To set a field validation rule

1. With the table in Design view, select a field, and then click in the **Validation Rule** box in the **Field Properties** area.
2. Type an expression in the **Validation Rule** box, or click the **Build** button to use the Expression Builder.
3. Press Enter. Then save the table.

To test the validation rules in a table

➜ Open the table in Design view. Then right-click its title bar, and click **Test Validation Rules**.

To select an entire field

➜ Move the pointer to the left end of a field, and when the pointer changes to a thick cross, click the field.

To set a table validation rule

1. Right-click in the table window, and then click **Properties**.
2. Click in the **Validation Rule** box, type the information for the rule, press Enter, and then save the table.

To create a lookup list with the Lookup wizard

1. Set the data type of a field to **Lookup Wizard**.
2. Select the options you want, and then click **Next**.
3. Continue selecting the options you want, clicking **Next** when you are done with each page. When you are done filling out the wizard, click **Finish**.
4. On the **Quick Access Toolbar**, click the **Save** button.

To restrict what can be entered in a lookup list

1. In Design view, in the **Field Properties** area, click the **Lookup** tab.
2. Change **Limit To List** to **Yes**.
3. Change **Allow Value List Edits** to **No**.
4. Save the table.

To create a multi-column lookup list

1. Add a new field, name it, and then set the data type to **Lookup Wizard**.
2. Select the **values** option you want, and then click **Next**.
3. Type the number of columns you want, and then enter the data you want in each column.
4. Click **Next**, and then click **Finish**.
5. Save your changes.

To prevent a column from being displayed in a multi-column lookup list

➜ In Design view, on the **Lookup** tab, in the **Column Widths** box, change the width for the column you don't want displayed to **0**. Then save your changes.

To filter selections in a multi-column lookup list

1. Right-click any cell in a column you want to filter, point to **Text Filters**, and then click the filter option you want.
2. In the **Custom Filter** box, type criterion you want to filter for, and then press Enter.

To create a select query

1. You must first create a select query. On the **Create** tab, in the **Other** group, click the **Query Design** button.
2. In the **New Query** dialog box, with **Simple Query Wizard** selected, click **OK**.
3. In the **Tables/Queries** list, click the option you want. Then in the **Available Fields** list, double-click the fields you want to move to the **Selected Fields** list.
4. In the **Simple Query Wizard** dialog box, click **Finish** to create the select query.

To create an update query

1. First, create a select query that selects the records you want to update.
2. Open the select query in Design view. Then on the **Design** contextual tab, in the **Query Type** group, click the **Update** button.
3. In the design grid, type the expression for your update.

To create an action query

1. First, create a select query that selects the records you want to manipulate.
2. Open the select query in Design view. Then on the **Design** contextual tab, in the **Query Type** group, click the **Make Table**, **Append**, **Update**, or **Delete** button.
3. Provide the information requested for the specified query type.

To create a delete query

1. First, create a select query that selects the records you want to delete.
2. Open the select query in Design view. Then on the Design contextual tab, in the **Query Type** group, click the **Delete** button to convert this select query to a delete query.
3. In the design grid, set the delete criteria.

To back up a database

1. Click the **Microsoft Office Button**, point to **Manage**, and then click **Back Up Database**.
2. In the **Save As** dialog box, navigate to the folder in which you want to store the backup, and then click **Save**.

To compact a database

➜ Click the **Microsoft Office Button**, point to **Manage**, and then click **Compact and Repair Database**. Acknowledge the safety warning if prompted to do so.

To analyze the performance of a database

1. On the **Database Tools** tab, in the **Analyze** group, click the **Analyze Performance** button.
2. In the **Performance Analyzer** dialog box, on the **All Object Types** tab, click **Select All**, and then click **OK**.
3. Click each result in the **Analysis Results** box to display more information about that result in the **Analysis Notes** area.

To document a database

1. On the **Database Tools** tab, in the **Analyze** group, click the **Database Documenter** button.
2. In the **Documenter** dialog box, select the options you want on each tab. Then click **OK** to start the documentation process.

Part IV Microsoft Office PowerPoint 2007

13 Starting a New Presentation

To base a presentation on an example from Office Online

1. On the **Office** menu, click **New**.
2. In the left pane, under **Microsoft Office Online**, click **Presentations**.
3. Scroll the center pane until you find the presentation you want, and then click **Download**.

To base a presentation on an existing presentation

1. On the **Office** menu, click **New**.
2. In the left pane, under **Templates**, click **New from existing**.
3. Navigate to the folder containing the presentation on which you want to base the new one, and then double-click that presentation.

To base a presentation on a design template

1. On the **Office** menu, click **New**.
2. In the left pane, under **Microsoft Office Online**, click **Design slides**.
3. In the **Design slides** category list, click the category that you want.
4. Scroll the center pane until you find the template you want, and then click **Download**.

To add a new slide with the default layout

➜ On the **Home** tab, in the **Slides** group, click the **New Slide** button.

To add slides with other layouts

➜ On the **Home** tab, in the **Slides** group, click the **New Slide** arrow, and then in the list, click the layout you want.

To delete a slide

➜ At the top of the **Overview** pane, on the **Slides** tab, right-click the slide, and then click **Delete Slide**.

To convert a Microsoft Office Word outline into a presentation

1. On the **Home** tab, in the **Slides** group, click the **New Slide** arrow, and then click **Slides from Outline**.
2. Navigate to the folder containing the Word outline, and then double-click the Word document.

To save a presentation as an outline

1. On the **Office** menu, click **Save As**.
2. In the **File name** box, enter the name of the outline file.
3. In the **Save as type** list, click **Outline/RTF**.
4. Navigate to the folder where you want to store the outline, and then click **Save**.

To insert a slide from another presentation

1. Click the slide after which you want to insert the slide.
2. On the **Home** tab, in the **Slides** group, click the **New Slide** arrow, and then in the list, click **Reuse Slides**.
3. In the **Reuse Slides** task pane, click the **Open a PowerPoint File** link.
4. Navigate to the folder containing the presentation with the slide you want to reuse, and double-click the presentation.
5. In the task pane, click the slide you want to reuse.

14 Working with Slide Text

To create slides, bullet points, and subpoints on the Outline tab

- Click to the right of a slide title, and then press Enter to create a new slide.
- With the insertion point in a slide title, press Tab to convert it to a bullet point.
- With the insertion point in a bullet point, press Shift+Tab to convert it to a slide.
- With the insertion point in the bullet point, press Tab to convert it to a subpoint.

To delete or replace a word

- Double-click the word to select it, and then press Del or Backspace.
- Double-click the word, and then type a different word.

To move selected text

→ On the **Outline** tab or the slide, drag the selection to the desired location.

or

1. On the **Home** tab, in the **Clipboard** group, click the **Cut** button.
2. Click where you want to insert the text, and then click the **Paste** button.

To undo or redo editing actions

➜ On the **Quick Access Toolbar**, click the **Undo** or **Redo** button.

To select an entire placeholder

➜ Point to the border of the placeholder, and when the pointer changes to a four-headed arrow, click the mouse button once.

To create a text box

➜ On the **Insert** tab, in the **Text** group, click the **Text Box** button, click the slide, and then type the text.

To rotate a selected text box

➜ Drag the green rotating handle in the direction you want.

To move a selected text box

➜ Point to the border of the box (not to a handle), and then drag the box to the location you want.

To size a selected text box

➜ Point to one of the square or round handles around its frame, and drag the handle until the box is the size you want.

To add a solid border to a text box

1. Right-click the border of the text box, and then click **Format Shape**.
2. In the **Format Shape** dialog box, click **Line Color**, click the line option you want, select appropriate options, and then click **Close**.

To change the default settings of a text box

1. Format the text and the text box the way you want all the text boxes you create from now on in this presentation to be.
2. Right-click the border of the text box, and then click **Set as Default Text Box**.

To add an AutoCorrect entry

1. On the **Office** menu, click **PowerPoint Options**, click **Proofing**, and then click **AutoCorrect Options**.
2. In the **Replace** box above the table in the dialog box, type a word you commonly misspell, and then press Tab.
3. In the **With** box, type the correct spelling of the word, click **Add**, and then click **OK** twice to close the dialog box and PowerPoint Options window.

To correct a word flagged as a misspelling

➜ Right-click the word, and on the context menu, click the correct spelling.

To mark a non-English word

1. With the insertion point in the word, on the **Review** tab, in the **Proofing** group, click the **Language** button.
2. In the **Language** dialog box, click the language, and then click **OK**.

To check the spelling of an entire presentation

1. With the first slide displayed, on the **Review** tab, in the **Proofing** group, click the **Spelling** button.
2. If the **Spelling** dialog box appears, click the appropriate buttons to correct the errors PowerPoint finds or to add words to the custom dictionary or AutoCorrect list.
3. Click **OK** when PowerPoint reaches the end of the spelling check, and then click **Close**.

To find a synonym for a selected word

1. On the **Review** tab, in the **Proofing** group, click the **Thesaurus** button.
2. Point to the word you want to substitute for the selection, click the arrow that appears, and then click **Insert**.

To find and replace a word

1. On the **Home** tab, in the **Editing** group, click the **Replace** button.
2. In the **Find what** box, type the word you want to replace, and in the **Replace with** box, type the replacement text.
3. If necessary, select the **Match case** or **Find whole words only** check box.
4. Click **Find Next**, and then click **Replace** or **Replace All**.

To find and replace a font

1. On the **Home** tab, in the **Editing** group, click the **Replace** arrow, and then in the list, click **Replace Fonts**.
2. In the **Replace** list, click the font you want to replace. In the **With** list, click the replacement font. Then click **Replace**.

To hide or display an object on a slide

1. On the **Home** tab, in the **Editing** group, click the **Select** button, and then click **Selection Pane**.
2. In the **Shapes on this Slide** area of the task pane, click the box to the right of the object to hide or display it.

To change the font size

- On the **Home** tab, in the **Font** group, click the **Decrease Font Size** or **Increase Font Size** button.
- In the **Font Size** list, click the desired size.

To change the size of a placeholder

→ Point to one of the placeholder's handles, and when the pointer changes to a two-headed arrow, drag to increase or decrease the size.

To size a placeholder to fit its text

1. Right-click the placeholder's border, and then click **Format Shape**.
2. Click **Text Box**, click **Resize shape to fit text**, and then click **Close**.

To change text alignment

→ With the insertion point in the text you want to align, on the **Home** tab, in the **Paragraph** group, click the **Left**, **Center**, **Right**, or **Justify** button.

To adjust line spacing

→ Click the paragraph. Then on the **Home** tab, in the **Paragraph** group, click the **Line Spacing** button, and click the spacing you'd like to use.

or

1. Click the paragraph, and then click the **Paragraph** Dialog Box Launcher.
2. Under **Spacing**, in the **Paragraph** dialog box, adjust the **Line Spacing** setting, and then click **OK**.

To change the text case

→ On the **Home** tab, in the **Font** group, click the **Change Case** arrow, and then in the list, click the option you want.

To apply bold or italic formatting to text

- On the **Home** tab, in the **Font** group, click the **Bold** or **Italic** button.
- On the **Mini toolbar**, click the **Bold** or **Italic** button.

To change the color of text

→ On the **Home** tab, in the **Font** group, click the **Font Color** arrow, and then click the color you want.

15 Adjusting the Layout, Order, and Look of Slides

To change the layout of a slide

➜ On the **Home** tab, in the **Slides** group, click the **Layout** button. Then in the **Layout** gallery, click the layout you want.

To restore the default layout after making changes

➜ On the **Home** tab, in the **Slides** group, click the **Reset** button.

To collapse bullet points under slide titles

➜ On the **Outline** tab of the **Overview** pane, double-click the title of the slide whose bullet points you want to hide. Double-click again to redisplay them.

To expand or collapse the entire presentation outline

➜ On the **Outline** tab of the **Overview** pane, right-click the title of a slide, point to **Expand** or **Collapse**, and then click **Expand All** or **Collapse All**.

To arrange slides in a presentation

- On the **Slides** tab of the **Overview** pane, drag slide thumbnails to new positions.
- On the **View** toolbar, click the **Slide Sorter** button, and then drag slide thumbnails to new positions.

To move slides from one open presentation to another

1. Open two or more presentations in Slide Sorter view, and then on the **View** tab, in the **Window** group, click the **Arrange All** button.
2. Drag slides from one presentation window to another.

To change the theme

➜ On the **Design** tab, in the **Themes** group, click the **More** button to display the **Themes** gallery, and then click the theme you want.

To change the color scheme

1. On the **Design** tab, in the **Themes** group, click the **Colors** button.
2. In the **Colors** gallery, click the color scheme you want.

To create your own color scheme

1. On the **Design** tab, in the **Themes** group, click the **Colors** button, and then click **Create New Theme Colors**.
2. In the **Create New Theme Colors** dialog box, select the colors you want, and then click **Save**.

To change the color scheme of the current slide

➜ On the **Design** tab, in the **Themes** group, click the **Colors** button. Then right-click the color scheme you want, and click **Apply to Selected Slides**.

To change a theme's fonts and effects

- On the **Design** tab, in the **Themes** group, click the **Fonts** button, and then click the font combination you want.
- On the **Design** tab, in the **Themes** group, click the **Effects** button, and then click the effect combination you want.

To create a custom font combination

1. On the **Design** tab, in the **Themes** group, click the **Fonts** button, and then click **Create New Theme Fonts**.
2. In the **Create New Theme Fonts** dialog box, specify the font combination you want, and then click **Save**.

To add a picture to the slide background

1. On the **Design** tab, in the **Background** group, click the **Background Styles** button, and then in the list, click **Format Background**.
2. In the **Format Background** dialog box, click **Picture or texture fill**.
3. Click **File**, navigate to the folder containing the picture you want to use, and then double-click the picture you want.
4. To make the picture fill the entire slide, select the **Tile picture as texture** check box.
5. To use the picture in the background of the current slide, click **Close**, or to use it in the background of all slides, click **Apply to All**.

To add a shade or texture to the slide background

- On the **Design** tab, in the **Background** group, click the **Background Styles** button, and then click a shade.
- On the **Design** tab, in the **Background** group, click **Format Background**, and specify a shade or texture in the **Format Background** dialog box.

16 Delivering a Presentation Electronically

To create a custom slide show

1. On the **Slide Show** tab, in the **Start Slide Show** group, click the **Custom Slide Show** button, and then click **Custom Shows**.
2. In the **Custom Shows** dialog box, click **New**.

3. In the **Slide show name** box of the **Define Custom Show** dialog box, type a name for the custom show.
4. In the **Slides in presentation** list, click the slides you want, and then click **Add**.

To start a custom show

➜ Display the **Custom Shows** dialog box, select the custom show, and then click **Show**.

To hide a slide

➜ In the **Overview** pane, on the **Slides** tab, right-click the slide, and then click **Hide Slide**.

To display a hidden slide while delivering a presentation

➜ Right-click the screen, point to **Go to Slide**, and then click the hidden slide.

To apply slide timings to all the slides

1. On the **Animations** tab, in the **Transition to This Slide** group, under **Advance Slide,** select the **Automatically After** check box, and then type or select the time you want the current slide to appear on the screen.
2. On the **Animations** tab, in the **Transition to This Slide** group, click the **Apply To All** button.

To rehearse a presentation and apply slide timings

1. With Slide 1 displayed, on the **Slide Show** tab, in the **Set Up** group, click the **Rehearse Timings** button.
2. Rehearse the presentation, clicking **Next** to move to the next slide. To repeat the rehearsal for a particular slide, on the **Rehearsal** toolbar, click the **Repeat** button to reset the time for that slide to 0:00:00.
3. At the end of the slide show, click **Yes** to apply the recorded slide timings to the slides.

To set up a self-running presentation

1. On the **Slide Show** tab, in the **Set Up** group, click the **Set Up Slide Show** button.
2. In the **Show type** area of the **Set Up Show** dialog box, click **Browsed at a kiosk (full screen)**, and select or clear the **Show without narration** and the **Show without animation** check boxes. Then click **OK**.

To enter speaker notes

➜ With a slide selected, in the **Notes** pane, click the **Click to add notes** placeholder, type your note, and then press Enter.

To insert a graphic, table, or other object in a note

1. On the **View** tab, in the **Presentations Views** group, click the **Notes Pages** button.
2. Insert the object the way you would insert it on a slide.

To customize the layout of speaker notes

➜ On the **View** tab, in the **Presentation Views** group, click the **Notes Master** button. Then adjust the layout the way you would adjust the layout of a slide master.

To print speaker notes or handouts

1. On the **Office** menu, click **Print**.
2. In the **Print** dialog box, in the **Print what** list, click **Notes Pages** or **Handouts**.

To prepare a presentation for travel

1. On the **Office** menu, point to **Publish**, and then click **Package for CD**. Click **OK** in the message box that appears.
2. In the **Name the CD** box of the **Package for CD** dialog box, type the name you want.
3. To include embedded fonts, click **Options**. Then under **Include these files**, select the **Embedded TrueType fonts** check box, and click **OK**.
4. Insert a blank CD in your CD burner, and then click **Copy to CD**, or click **Copy to Folder**, and then select the folder in which you want to store the package.
5. When PowerPoint asks you to verify that you want to include linked content, click **Yes**.

To run a presentation in the PowerPoint Viewer

- If you're running your presentation from a CD, insert the CD into the CD burner, and then in the list of file and folder names, double-click the presentation name.
- If you're running the presentation from your computer, navigate to the folder where the package is stored, and double-click the package folder. Then double-click **PPTVIEW** to start the Presentation Viewer.

To navigate by using the keyboard

- To move to the next slide, press Space, the ↓ key, or the → key.
- To move to the previous slide, press the Page Up key or the ← key.
- To end the presentation, press the Esc key.

To end a presentation without a black screen

1. On the **Office** menu, click **PowerPoint Options**, and then click **Advanced**.
2. In the **Slide Show** area, clear the **End with Black Slide** check box, and then click **OK**.

To navigate by using the onscreen toolbar

- To move to the next slide, click the **Next** button.
- To move to the previous slide, click the **Previous** button.
- To jump to a slide out of sequence (even if it is hidden), click the **Navigation** button, click **Go To Slide**, and then click the slide.
- To display the slides in a custom slide show, click the **Navigation** button, click **Custom Show**, and then click the show.
- To display keyboard shortcuts for slide show tasks, click the **Navigation** button, and then click **Help**.
- To end the presentation, click the **Navigation** button, and then click **End Show**.

To use a pen tool to mark up slides

➜ Right-click the screen, point to **Pointer Options**, click a pen style, and then use the pen pointer to mark slides. (Change the pointer option to **Arrow** to turn off the pen.)

To erase all markup from a slide

➜ Right-click the screen, point to **Pointer Options**, and then click **Erase All Ink on Slide**.

Part V Microsoft Office Outlook 2007

17 Sending E-Mail Messages

To check addresses

➜ If a message recipient's address is in your address book, type the person's name and either wait for Outlook to validate the name or press Ctrl+K to immediately validate it.

To have Outlook search additional address books

1. On the **Tools** menu, click **Address Book**. Then in the **Address Book** window, on the **Tools** menu, click **Options**.
2. In the **Addressing** dialog box, click **Add**.
3. In the **Add Address List** dialog box, click the address list you want to add, click **Add**, and then click **Close**.
4. In the **Addressing** dialog box, click **OK**, and then in the **Address Book** window, click the **Close** button.

To send a courtesy copy of a message

➜ In the message window, enter an e-mail address in the **Cc** or **Bcc** box.

To display the Bcc field in an outgoing message

➜ In the message window, on the **Options** tab, in the **Fields** group, click the **Show Bcc** button.

To compose and send a new e-mail message

1. On the **Standard** toolbar, click the **New Mail Message** button.
2. In the **To** box of the message window, type an e-mail address.
3. In the **Subject** box, enter the main idea of your message.
4. In the message content area, type the body of the message.
5. When you finish, click **Send**.

To recall a message

1. In the **Sent Items** folder, open the message you want to recall.
2. On the **Message** tab, in the **Actions** group, click the **Other Actions** button, and then click **Recall This Message**.
3. Select the option to delete unread copies of the message or to replace them with a new message, and then click **OK**.

To attach a file to an e-mail message

1. Display the message window.
2. On the **Message** tab, in the **Include** group, click the **Attach File** button (not the arrow under the button).
3. Browse to the file you want to attach, click it, and then click **Insert**.

To send a business card

1. Display the message window.
2. On the **Message** tab, in the **Include** group, click the **Insert Business Card** button, and then in the list, click **Other Business Cards**.
3. In the **Insert Business Card** dialog box, select the card or cards you want to send, and then click **OK**.

To create a SmartArt diagram within an e-mail message

1. Click to place the insertion point in the message content area.
2. On the **Insert** tab, in the **Illustrations** group, click the **SmartArt** button.
3. In the **SmartArt** gallery, click the diagram you want to create, and then click **OK**.

To format the text of an e-mail message

➜ In the message content area, select the text you want to format. Then do one of the following:

- Click formatting buttons on the **Mini toolbar**.
- Click formatting buttons in the **Basic Text** group on the **Message** tab.

To apply a different theme to an outgoing e-mail message

1. In the message window, on the **Options** tab, in the **Themes** group, click the **Themes** button.
2. In the **Themes** gallery, click the theme you want.

To create a signature and insert it in all the new messages

1. On the **Tools** menu, click **Options**. On the **Mail Format** tab of the **Options** dialog box, click **Signatures**.
2. On the **E-mail Signature** tab of the **Signatures and Stationery** dialog box, click **New**.
3. In the **New Signature** dialog box, type a name for the signature, and then click **OK**.
4. In the signature content area, type a salutation, such as Regards, and a comma. Press the Enter key once or twice, and then type your name.
5. Add any other information you want to include, such as a telephone number, legal disclaimer, or link to your organization's Web site, and format the text and paragraphs the way you want them to appear in messages.
6. In the **Choose default signature** area of the **Signatures and Stationery** dialog box, in the **New messages** list, click the name you gave your signature. Then click **OK** twice.

18 Managing Your Inbox

To use Instant Search to locate a specific message

- In the **Search** box at the top of the Inbox, type a word contained in the message.
- To refine the search, click the **Expand the Query Builder** button to the right of the **Search** box, and supply additional information.
- To expand the search to include all the folders in your mailbox, at the bottom of the Search Results pane, click **Try searching again in All Mail Items**.
- To remove the search filter and view all messages, click the **Clear Search** button.

To change the display, arrangement, sort order, and grouping of messages

- On the **View** menu, point to **Arrange By**, and then click the command you want; or
- Click the column heading on which you want to sort messages. Click it again to reverse the order.

To expand or collapse groups

➜ On the **View** menu, point to **Expand/Collapse Groups**, and then click the collapse or expand view you want.

To filter the Inbox content

➜ On the **View** menu, point to **Current View**, and then click the view you want. Click **Messages** on the **Current View** list to remove the filter.

To add and remove fields

1. On the **View** menu, point to **Current View**, and then click **Customize Current View**.
2. In the **Customize View** dialog box, click the **Fields** button.
3. To add fields, in the **Available fields** list of the **Show Fields** dialog box, click the fields you want to add, and then click **Add**.
4. To remove fields in any list view, drag the column heading downward, and release the mouse button when a large black X appears over the heading.

To change the order of columns in any view

➜ Drag the column headings to the locations you prefer.

To restore the default Inbox settings

1. On the **View** menu, point to **Current View**, and then click **Define Views**.
2. In the **Custom View Organizer** dialog box, click **Reset**. In the **Microsoft Office Outlook** message box asking whether you want to reset the current view to its original settings, click **OK**.
3. Reset any customized views you want by clicking the view name and then clicking **Reset**. When you finish, click the **Messages** view, and then click **Apply View**.

To create a custom Search Folder

1. In the **Navigation Pane**, right-click the **Search Folders** folder, and then click **New Search Folder**.
2. In the **New Search Folder** dialog box, scroll the **Select a Search Folder** list to see the available options, select the option you want, and then click **OK**.

To make changes to the contents of an existing Search Folder

➜ Right-click the folder, and then click **Customize this Search Folder**.

To display the default color categories

➜ In the Inbox, click a message you want to categorize, and then on the **Standard** toolbar, click the **Categorize** button.

To rename categories

1. On the **Standard** toolbar, click the **Categorize** button, and in the **Category** list, click **All Categories**.
2. In the **Color Categories** dialog box, click the category (not the check box), and then click **Rename**.
3. Type the name you want, and then press Enter.

To change the color associated with a category

1. On the **Standard** toolbar, click the **Categorize** button, and in the **Category** list, click **All Categories**.
2. In the **Color Categories** dialog box, click the category you want.
3. In the **Color** palette, click the icon of the color you want.

To create categories

1. On the **Standard** toolbar, click the **Categorize** button, and in the **Category** list, click **All Categories**.
2. In the **Color Categories** dialog box, click **New**.
3. In the **Name** box of the **Add New Category** dialog box, type the name you want to give the category. Then if you want, assign a color and a shortcut key.

To sort the Inbox contents by category

1. At the top of the Inbox, click the **Arranged By** bar, and then click **Categories**.
2. To the right of the **Arranged By** bar, click the command you want.

To create a folder

1. On the **Standard** toolbar, in the **New** list, click **Folder**.
2. In the **Name** box of the **Create New Folder** dialog box, type the folder name, and then click **OK**.

To move messages to a folder

➜ Drag the message to the desired folder in the **Navigation Pane**.

or

1. Right-click the message, and then click **Move to Folder**.
2. In the **Move Items** dialog box, in the **Move the selected items to the folder** list, click the folder where you want to move the message, and then click **OK**.

To send the content of an e-mail message to OneNote

➜ Select the message, and then on the **Standard** toolbar, click the **Send selected e-mail to OneNote** button.

To set the default automatic archive options

1. On the **Tools** menu, click **Options**. On the **Other** tab of the **Options** dialog box, click **AutoArchive**.
2. Make the changes you want to your AutoArchive settings, then click **OK** in each of the open dialog boxes.

To manually archive a folder

1. Click the folder you want to archive. Then on the **File** menu, click **Archive**.
2. In the **Archive** dialog box, select the **Archive this folder and all subfolders** option, and then click **OK**.

To set the archive options for an individual folder

1. Right-click the folder in the **Navigation Pane**, and then click **Properties**.
2. On the **AutoArchive** tab of the **Properties** dialog box, set the archive options you want, and then click **OK**.

19 Managing Appointments, Events, and Meetings

To schedule an appointment

1. In the Calendar, display the date on which you want to schedule an appointment.
2. Click the desired time slot, type information about the appointment, and then press Enter.
3. To change the end time for the appointment, drag the bottom border of the time slot down to the bottom of the end time.

To reschedule an appointment

→ Drag the appointment to a different time slot on the calendar.

To make an appointment recurring

1. Open the appointment. Then on the **Appointment** tab, in the **Options** group, click the **Recurrence** button.
2. In the **Recurrence pattern** area of the **Appointment Recurrence** dialog box, select the option that corresponds to the desired recurrence, and then click **OK**.
3. On the **Recurring Appointment** tab, in the **Actions** group, click the **Save & Close** button.

To schedule an event

1. In the **Date Navigator**, click the date on which you want to schedule an event, and then in the **Calendar** pane, click the blank space below the day header and above the time slots.
2. Type the name of the event, and then press Enter.

To make an event recurring

1. Double-click the event, and then on the **Event** tab, in the **Options** group, click the **Recurrence** button.
2. In the **Recurrence pattern** area of the **Appointment Recurrence** dialog box, select the option that corresponds to the recurrence you want, and then click **OK**.
3. On the **Recurring Event** tab, in the **Actions** group, click the **Save & Close** button.

To create and send a meeting request

1. In the **Date Navigator**, click the date on which you want the meeting to occur.
2. On the **Standard** toolbar, in the **New Appointment** list, click **Meeting Request**.
3. In the **To** box, type the e-mail addresses of the meeting attendees; in the **Subject** box, type the name of the meeting; and in the **Location** box, indicate where the meeting will take place.
4. On the **Meeting** tab, in the **Show** group, click the **Scheduling** button. Then set the meeting time, and click **Send**.

To manually respond to a meeting request

1. In the **Date Navigator**, double-click the scheduled meeting.
2. In the meeting request window, in the **Reading Pane**, click **Accept**, **Tentative**, or **Decline**.
3. Choose whether to send a standard response, a personalized response, or no response at all.

To propose a new time for a meeting

1. In the **Reading Pane** of the meeting request window, click **Propose New Time**.
2. In the schedule area of the **Propose New Time** dialog box, set the proposed meeting start and end times, and then click **Propose Time**.
3. In the meeting response window that opens, enter a message to the meeting organizer, and then click **Send**.

To instruct Outlook to automatically respond to meeting requests

1. On the **Tools** menu, click **Options**. On the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.
2. In the **Calendar Options** dialog box, click **Resource Scheduling**.
3. In the **Resource Scheduling** dialog box, select the **Automatically accept meeting requests and process cancellations** check box.
4. Select the **Automatically decline conflicting meeting requests** and/or the **Automatically decline recurring meeting requests** check boxes if you want Outlook to do this.
5. Click **OK** in each of the open dialog boxes.

20 Managing Your Calendar

To add the holidays of other countries to your calendar

1. On the **Tools** menu, click **Options**. On the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.
2. In the **Calendar Options** dialog box, click **Add Holidays**.
3. In the **Add Holidays to Calendar** dialog box, select the check boxes of the countries whose holidays you want to add, and then click **OK** in each open dialog box.

To remove holidays from your calendar

1. In Calendar view, on the **View** menu, point to **Current View**, and then click **All Appointments**.
2. On the **View** menu, point to **Current View**, and click **Customize Current View**. Then in the **Customize View** dialog box, click **Group By**.
3. In the **Group By** dialog box, clear the **Automatically group according to arrangement** check box if it is selected. Then in the **Group items by** list, click **Location**.
4. Ensure that all the **Then by** lists display **(none)**, and then click **OK** in each of the open dialog boxes.
5. In the **Calendar** pane, collapse the displayed groups or scroll the pane until the **Location** group of the holidays you want to remove is visible. Then do the following:
   - To remove a specific holiday, click it, and then press Del.
   - To remove all the holidays of the displayed country, click the **Location** group header, and then press Tab. If a **Microsoft Office Outlook** message box warns you that this action will apply to all items in the selected group, click **OK**.

To change your work week

1. Display your calendar in **Week** view, and at the top of the **Calendar** pane, click **Show work week**.
2. On the **Tools** menu, click **Options**. On the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.
3. In the **Calendar work week** area of the **Calendar Options** dialog box, select or clear the check boxes of the days of the week.
4. Set the start and end times, and then click **OK** in the open dialog boxes.

To change the time zone

1. On the **Tools** menu, click **Options**. On the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.
2. In the **Calendar Options** dialog box, click **Time Zone**.
3. In the **Time zone** list, click the time zone you want. Then click **OK** in each of the open dialog boxes.

To simultaneously display two time zones in your Calendar

1. On the **Tools** menu, click **Options**. On the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.
2. In the **Calendar Options** dialog box, click **Time Zone**.
3. In the **Time Zone** dialog box, select the **Show an additional time zone** check box. Then in the second **Time zone** list, click the additional time zone you want to display.
4. Type a label for each time zone in its corresponding **Label** box, and then click **OK** in each of the open dialog boxes.

To preview and print your calendar

1. On the **View** menu, click **Day**.
2. On the **Standard** toolbar, click the **Print** button. Then in the **Print** dialog box, click **Preview**.
3. On the **Print Preview** toolbar, click the **Print** button to redisplay the **Print** dialog box.
4. In the **Print style** list, click the style of printing you want.
5. In the **Print range** area, set the first and last dates you want to print, and then click **OK**.

To save calendar information as a Web page

1. Display your calendar, and then on the **File** menu, click **Save as Web Page**.
2. In the **Save as Web Page** dialog box, enter the start and end dates for which you want to publish calendar information.
3. In the **Options** area, select whether to include appointment details or a background graphic.
4. In the **Save as** area, append a file name (the extension is unnecessary) at the end of the path shown in the **File name** box. If you want, change the title that will be displayed on the Web page and the location where Outlook saves it.
5. With the **Open saved web page in browser** check box selected, click **Save**.

To embed information about your schedule in an e-mail message

1. Display your calendar, and then in the **Navigation Pane**, under **Other Calendars**, click **Send a Calendar via E-mail**.
2. In the **Send a Calendar via E-mail** dialog box, in the **Date Range** list, click the command you want.
3. In the **Detail** list, click the option you want.
4. Click **Advanced**, set any options you want, and then click **OK**.

To link one or more calendar entries to OneNote

➜ Select the calendar item (or items) you want to link. Then on the **Standard** toolbar, click the **Open or create linked notes in OneNote** button.

To link to an Internet calendar

1. In the **Calendar** module **Navigation Pane**, scroll the **All Calendar Items** list to the **Other Calendars** section, and then click **Search Calendars Online**.
2. On the **Internet Calendars** page, scroll to the **Subscribe to a Free Internet Calendar** section, and then click the Internet calendar you want.
3. If an **Internet Explorer Security** message box prompts you to allow Outlook to open Web content, click the **Allow** button.
4. In the **Microsoft Office Outlook** message box asking whether you want to add the calendar to Outlook and subscribe to updates, click **Yes**.

To view multiple calendars side by side and as a composite

1. In either the **My Calendars** or **Other Calendars** list in the **Navigation Pane**, select the check box for at least one other calendar.
2. On the title bar tab of a secondary calendar, click the **View in Overlay Mode** button.

3. Click either **Calendar** tab to display that calendar on top of the other calendar.
4. On either of the overlaid calendars, click the **View in Side-By-Side Mode** button to return to the standard display.

To delegate control of your calendar so that meeting requests can be created and responded to on your behalf

1. On the **Tools** menu, click **Options**. On the **Delegates** tab of the **Options** dialog box, click **Add**.
2. In the **Add Users** dialog box, click the person you want to delegate control to, click **Add**, and then click **OK**.
3. In the **Delegate Permissions** dialog box, in the **Calendar** list, click the level of permission you want to delegate.
4. Select the **Automatically send a message to delegate summarizing these permissions** check box, and then click **OK** in each of the open dialog boxes.

Part VI Microsoft Office Publisher 2007

21 Creating Colorful Cards and Calendars

To create a folded card based on a layout template

1. In the **Publication Types** list, click **Invitation Cards**. In the center pane, click the design you want.
2. In the **Customize** area in the right pane, select the **Color scheme**, **Font scheme**, and **Business information**.
3. In the **Options** area, select the **Page size** and **Layout** (if these options are available for the selected card design). Then click **Create**.

To create a postcard

1. In the **Publication Types** list, click **Postcards**. In the center pane, click the design you want.
2. In the **Customize** area in the right pane, select the **Color scheme**, **Font scheme**, and **Business information**.
3. In the **Options** area, select the **Page size** and **Side 2 information**. Then click **Create**.

To merge a publication with a data source

1. In the open publication, on the **Tools** menu, point to **Mailings and Catalogs**, and click **Mail Merge**.
2. With **Use an existing list** selected under **Create recipient list**, click **Next: Create or connect to a recipient list** at the bottom of the task pane.
3. In the **Select Data Source** dialog box, navigate to the recipient list you want, and double-click it.
4. In the **Select Table** dialog box, select the data you want, and then click **OK**.
5. In the **Mail Merge Recipients** dialog box, change any settings you want or use the default settings, and then click **OK**.
6. By clicking the links under **More Items** in the task pane, insert the fields you want to include in the merged publication.
7. At the bottom of the **Mail Merge** task pane, click **Next: Create merged publication**.
8. In the task pane, click **Merge to a new publication**. Then on the page sorter, click each page in turn to see the results.

To create a calendar

1. In the **Publication Types** list, click **Calendars**. In the center pane, click the design you want.
2. In the right pane, in the **Customize** area, select the **Color scheme**, **Font scheme**, and **Business information**.
3. In the **Options** area, select the **Page size** and **Timeframe** options you want.
4. If you want to create a calendar for other than the current time period, click **Set Calendar Dates**, choose the time period, and then click **OK**.
5. If the **Include schedule of events** option is available and you want to create a smaller calendar that includes a text area for events or other information, select that check box.
6. Click **Create**.

To replace an image

1. Right-click the existing picture, point to **Change Picture**, and then click **From File**.
2. In the **Insert Picture** dialog box, browse to and select the picture you want, and then click **Insert**.

To switch between task panes

➜ On the task pane title bar, click the **Other Task Panes** button, and then click the task pane you want to display.

To apply a background to a publication

- In the **Background** task pane, select the background color and gradient you want.

  or

- In the **Background** task pane, click **More backgrounds**, and then specify the gradient, texture, pattern, picture, and/or tint you want.

To install the Microsoft Save As PDF Or XPS add-in

1. Start your default Internet browser, and go to *office.microsoft.com/en-us/downloads/*.
2. In the left pane, under **By Version**, click **2007 Office System**, click **2007 Microsoft Office System**, and then click **Add-ins**.
3. In the list of add-ins, click **2007 Microsoft Office Add-in: Microsoft Save As PDF or XPS**.
4. On the installation page, click **Continue**. After the Genuine Advantage Tool confirms that you are running genuine, licensed software, click **Install** and follow the installation instructions given.
5. After the installation completes, navigate to the publication you want to submit to a printer, and then double-click it.

To create a CD or file package containing all the files necessary to submit a publication to a professional printer

1. On the **File** menu, point to **Pack and Go**, and then click **Take to a Commercial Printing Service**.
2. In the **Take to a Commercial Printing Service** task pane, click **Printing Options**.
3. In the **Print Options** dialog box, apply any settings necessary, and then click **OK**.
4. At the bottom of the task pane, click **Save**.
5. Insert a blank CD in your CD burner, and with **Burn to disc on D:** (or the equivalent drive on your computer) selected, click **Next**. If your computer does not have a CD burner, click **Other Location** instead, and then browse to the folder in which you want to store the package.
6. When the wizard announces that your publication is successfully packed, clear the **Print a composite proof** check box, and then click **OK**.

22 Creating Text-Based Publications

To replace placeholder text

➜ Click the placeholder text, and then enter the text you want.

To automatically size text to fit the text box in which it appears

➜ Select the text box. Then on the **Format** menu, point to **AutoFit Text**, and click **Shrink Text On Overflow**.

To add pages to a newsletter

➜ On the **Insert** menu, click **Duplicate Page** to insert a page with the same layout as the previous page.

or

1. On the **Insert** menu, click **Page**.
2. In the **Insert Newsletter Page** dialog box, in the **Available page types** list or in the **Left-hand page** and **Right-hand page** lists, click the page type you want to insert. Then click **OK**.

or

1. On the **Insert** menu, click **Page**. Then in the **Insert Newsletter Page** dialog box, click **More**.
2. In the **Insert Page** dialog box, select the number of pages to insert, the insertion location, and the page content. Then click **OK.**

To apply or reapply a font theme to an existing publication

➜ Display the **Font Schemes** section of the **Format Publication** task pane. Then in the **Apply a font scheme** list, click the font scheme you want.

To trace the continuation of a story in a newsletter

➜ Click the **Go to Previous Text Box** and **Go to Next Text Box** buttons.

To move pages in a newsletter

- To move a two-page spread, in **Two-Page Spread** view, on the page sorter, drag either page to the new location.
- To move one page, turn off **Two-Page Spread** view. Then on the page sorter, drag the page to the new location.

To insert or remove Continued notices

1. Select the text box. On the **Format** menu, click **Text Box**.
2. On the **Text Box** tab of the **Format Text Box** dialog box, clear or select the **Include “Continued on page…”** check box.

To format text in columns

➜ Click the **Columns** button. Then in the **Columns** dialog box, set the number of columns you want, and click **OK**.

To delete a page from a newsletter

➜ On the page sorter, right-click the page button of the page you want to delete, and click **Delete Page**. Then in the **Microsoft Office Publisher** message box, click **Yes** to confirm the deletion of the page, including the empty text box.

To create a publication from a Microsoft Office Online template

1. In the **Publication Types** list, click the publication type you want to search for.
2. In the center pane, below **Microsoft Office Online Templates**, click **View templates from Microsoft Office Online**.
3. Select a template you like, and then click **Create**.

To edit a story by using Microsoft Office Word

➜ Right-click the main placeholder text, point to **Change Text**, and then click **Edit Story in Microsoft Word**.

To check the spelling of a publication

1. On the **Tools** menu, point to **Spelling**, and then click **Spelling**.
2. In the **Check Spelling** dialog box, correct any errors that appear, by accepting the suggestion or entering any replacement text you want in the **Change to** box. Then click **Change** to effect the replacement and move to the next detected error.
3. In the **Microsoft Office Publisher** dialog box that appears when the spelling check is complete, click **OK**.

Part VII Microsoft Office OneNote 2007

23 Collecting Information in a Notebook

To change the paragraph indentation for the purpose of assigning a level

1. Click to position the insertion point at the beginning of the paragraph.
2. Press the Tab key to increase the level, or press the Backspace key or Shift+Tab to decrease the level.

To hide one or more levels of text within a note

➜ Right-click the note container header, point to **Hide Levels Below**, and then click the lowest level you want visible.

To enter text in a notebook page

➜ Click to position the insertion point on the page, and then type what you want.

To insert the content of an Office document

1. On the **Insert** menu, click **Files as Printouts**.
2. In the **Choose Document to Insert** dialog box, browse to the file you want, and then click **Insert**.

To insert a picture

1. On the **Insert** menu, point to **Pictures**, and then click **From Files**.
2. In the **Insert Picture** dialog box, browse to the picture you want, and click **Insert**.

To resize an inserted image

1. Point to the edge of the image so that a dashed outline appears. When the pointer changes to a four-headed arrow, click the image outline.
2. Drag a sizing handle to resize the image.
3. Right-click the image to display additional options.

To create a handwritten note

1. Display the **Writing Tools** toolbar.
2. On the **Writing Tools** toolbar, in the **Pen** list, click the option you want.
3. Point to the notebook page, and drag the pen on the notebook page to draw or write what you want.

To insert clip art from another program

1. In Word (or another program that supports clip art), click the **Clip Art** button in the **Illustrations** group on the **Insert** menu.
2. In the **Clip Art** task pane, locate the clip art you want.
3. Point to the clip art, click the arrow that appears, and then click **Copy**.
4. Switch to OneNote, and paste the clip art from the Clipboard onto the page.

To insert clip art from the Clip Organizer

1. On the **Start** menu, click **All Programs**, click **Microsoft Office**, click **Microsoft Office Tools**, and then click **Microsoft Clip Organizer**.
2. In the **Clip Organizer**, locate the clip art you want.
3. Point to the clip art, click the arrow that appears, and then click **Copy**.
4. Switch to OneNote, and paste the clip art from the Clipboard onto the page.

To start the Screen Clipper

- If your keyboard has a Windows logo key, press Windows+Space.
- Right-click the OneNote icon in the notification area of the taskbar, and then click **Create Screen Clipping**.
- In the OneNote program window, click the **Clip** button on the **Standard** toolbar, or click **Screen Clipping** on the **Insert** menu.

To capture a Web note

1. Display the Web page you want to send to OneNote.
2. On the **Tools** menu, click **Send to OneNote**.

To capture a screen clipping

1. Display the content you want to capture.
2. If your keyboard has a Windows logo key, press Windows+Space; or in the notification area at the right end of the taskbar, right-click the **OneNote** icon, and then click **Create Screen Clipping**.
3. Drag to select the area that you want to clip.

To delete all the notes from a section

➜ In the **Page Tabs** area, click the active page tab, and press Ctrl+Del to select all the pages in the section. Then press Del.

To create an audio recording

1. Ensure that your computer system includes a microphone. If necessary, run the **Tuning Wizard** to configure the microphone input levels.
2. Display the page on which you want to insert the audio clip.
3. On the **Insert** menu, click **Audio Recording**.
4. Speak, sing, or otherwise deliver the audio content you want to record. When you finish, click the **Stop** button on the **Audio and Video Recording** toolbar.

To create a video recording

1. Ensure that your computer system includes a video camera.
2. Display the page on which you want to insert the video clip.
3. On the **Insert** menu, click **Video Recording**.
4. Deliver the video content you want to record. When you finish, click the **Stop** button on the **Audio and Video Recording** toolbar.

To play back a recording

➜ Double-click the **Audio Clips** or **Video Clips** icon on the notebook page.

To manually install OneNote Mobile

1. Start OneNote, and connect your mobile device to the computer.
2. On the **Tools** menu, click **Options**.
3. In the **Category** list, click **OneNote Mobile**.
4. Click the **Install OneNote Mobile** button, and follow the instructions in the setup program.

To turn on the OneNote icon in the notification area

1. In OneNote, click **Options** on the **Tools** menu.
2. In the **Options** window, in the **Category** list, click **Other**.
3. Select the **Place OneNote icon in the notification area of the taskbar** check box, and then click **OK**.

To change what happens when you click the OneNote icon

➜ Right-click the **OneNote** icon, point to **Options**, point to **OneNote Icon Defaults**, and then click the action you want.

To unhide the OneNote icon in the notification area

1. Right-click a blank area of the taskbar or notification area, or of the Windows **Start** button, and then click **Properties**.
2. In the **Taskbar and Start Menu Properties** dialog box, display the **Notification Area** tab.
3. In the **Icons** area, click **Customize**.
4. In the **Icon** list, locate the **One Note** icon (the label will vary depending on the action assigned to it). Click the corresponding behavior, and then in the list, click **Show**.
5. Click **OK** twice to close the dialog boxes and save your changes.

24 Organizing and Locating Information

To manipulate objects on a page

- Drag the note by its header.
- Select the note, and then when the pointer changes to a four-headed arrow, drag it by any part.
- Right-click the note, click **Move**, and then press the arrow keys (or hold down the Ctrl key and press the arrow keys to move in smaller increments).
- Right-click the note header, click **Cut**, right-click the new note location, and then click **Paste**.

To merge the contents of two note containers

➜ Hold down the Shift key while dragging one note container by its move handle to the other note container.

To split one note container into two containers

➜ Drag the object selector of any paragraph or object away from the note container to a different location on the page.

or

1. On the **Insert** menu, click **Extra Writing Space**, or on the **Writing Tools** toolbar, click **Insert or Remove Extra Writing Space**.
2. Point to the place in the note container where you want to separate the information. When the pointer changes to a downward-pointing arrow accompanied by a heavy blue horizontal line, drag downward until the content is separated into two containers.

To move a page between sections

➜ Click the tab of the page you want to move, and then drag it to the section you want, releasing it when the pointer changes to an arrow with a dotted box under it.

To move a note between pages

➜ Right-click the note container, and click **Cut**. Then right-click the tab of the page you want to move the note to, and click **Paste**.

To create a hyperlink to a note

1. Right-click any part of the note container you want to link to, and then click **Copy Hyperlink to this Paragraph**.
2. On the page where you want to include the link to the note, right-click near the location you want, and then click **Paste**.

To delete an object from a page

➜ Point to the object, and click the dashed line that appears. Then press the Del key.

To open multiple concurrent sessions of a notebook

➜ On the **Window** menu, click **New Window**.

To tag a specific paragraph within a note

➜ Place the insertion point anywhere in the paragraph (or select it). Then apply the tag.

To tag all the first-level (non-indented) paragraphs in a note

➜ Select the note container. Then apply the tag.

To apply a tag after indicating the content you want to tag

- On the **Standard** toolbar, click the **Tag** button to apply the currently selected tag (the tag used most recently).
- In the **Tag** list, click the tag you want to apply.
- Press one of the nine key combinations to apply the tag assigned to that combination.

To view your tagged notes

➜ In the **Tag** list, click **Show All Tagged Notes**.

To generate a summary page of your tagged notes

➜ At the bottom of the **Tags Summary** task pane, click the **Create Summary Page** button.

To enable Audio Search

1. On the **Tools** menu, click **Options**.
2. In the **Options** window, display the **Audio and Video** page.
3. In the **Audio Search** area, select the **Enable searching audio and video recordings for words** check box.
4. In the **Did you know about audio search?** window, click the **Enable Audio Search** button, and then in the **Options** window, click **OK**.

Part VIII Microsoft Office Groove 2007

25 Setting Up a Standard Workspace

To start Groove

➜ At the left end of the Windows taskbar, click the **Start** button, click **All Programs**, click **Microsoft Office**, and then click **Microsoft Office Groove 2007**.

To create a standard workspace

1. On the **Workspace** tab of the **Launchbar**, click **New Workspace**.
2. In the **Create New Workspace** dialog box, enter a name for your workspace, and then click **OK**.

or

1. In the **Workspace Explorer**, on the **File** menu, point to **New**, point to **Workspace From**, and then click **Template**.
2. In the **Browse** dialog box, navigate to the folder where the template is stored, select the template, and then click **Open**.

To rename a workspace

1. Right-click the workspace in the **Launchbar**, and then click **Rename**.
2. Enter a new name for the workspace, and then click **OK**.

To accept an invitation to a Groove standard workspace

1. In the notification area of the taskbar, click the Groove alert indicating that you have received an invitation.
2. In the **Respond to Invitation** dialog box, click **Accept**, and then click **OK** in the **Invitation Acceptance Tip** window.

To send an invitation to join a workspace

1. In the **Workspace Explorer**, on the **Options** menu, click **Invite to Workspace**.
2. In the upper-right corner of the **Send Invitation** dialog box, click the **Add More** link.
3. In the **Add Recipients** dialog box, click **Search for User**.
4. In the **Search For** box of the **Find User** dialog box, type the text you want to search for. Select the **Include Public Groove Directory** check box, and click **Find**. Then select the user you want to send an invitation to, and click **Add.**
5. In the **Add Recipients** dialog box, click **OK**.
6. In the **Send Invitation** dialog box, in the **Message** area, type a message for the recipient. At the bottom of the dialog box, select the **Require acceptance confirmation** check box.
7. Click **Invite**. In the **Invitation Tip** message window, click **OK**.

To view information about a workspace member

➜ In the **Workspace Members** list, point to the name of the person whose information you want to view.

To organize a list of workspace members

➜ In the **Workspace Explorer**, on the **View** menu, point to **View Members By**, and then click the organization option you want.

To initiate actions with workspace members

➜ In the **Workspace Members** list, right-click the name of a member, and then click the action you want.

To show or hide the Workspace Members list

➜ On the **View** menu, point to **Show/Hide**, and then click **Members**.

To set a workspace member's role

1. In the **Workspace Explorer**, on the **Options** menu, click **Set Roles**.
2. In the **Properties** dialog box, click the name of the user whose role you want to change, and then click **Change Role**.
3. In the **Change Role** dialog box, click the new role, and then click **OK** twice.

To change the permissions for a workspace role

1. In the **Workspace Explorer**, on the **Options** menu, click **Set Roles**.
2. On the **Permissions** tab of the **Properties** dialog box, in the **Select a role to modify its permissions** list, click the role.
3. Select the check boxes of the permissions you want, and then click **OK**.

To switch views

➜ On the **View** menu, point to **View Workspaces By**, and then click the option that represents the way you want to view the workspace.

To view workspace properties

➜ In the **Workspace Explorer**, on the **File** menu, point to **Properties**, and then click **Workspace**.

To add files to the Files tool

1. In the **Workspace Explorer**, click the **Files** tab.
2. In the **Folders** list, click the folder containing the files you want to add, and then, on the toolbar, click **Add Files**.
3. In the **Add Files** dialog box, navigate to the folder. Click the file you want to add, and then click **Open**.

To add a tool to a workspace

1. In the **Workspace Members** pane, in the **Common Tasks** area, click **Add Tools**.
2. In the **More Tools** dialog box, select the check box of the tool you want to add, and then click **OK**.

26 Managing and Sharing Files

To add a folder to the Files tool

1. In the **Folders** pane, click the **Files** folder.
2. On the **File** menu, point to **New**, and then click **Folder**.
3. Type a name for the folder, and then press Enter.

To embed a link to a file in a Groove instant message

1. In the **Workspace Explorer**, double-click the folder where the file is stored.
2. Right-click the file, and click **Copy as Link**.
3. On the **Options** menu, click **Send Message**.
4. In the **Send Message** window, select a name in the **To** list.
5. In the **Message** area, right-click, click **Paste**, and then click **Send**.

To save changes to a file that you have opened from the Files tool

1. Save your changes as usual. Then click the **Microsoft Office Button**, and click **Exit** ***<program>***.
2. In the **Editing File – Save** dialog box, click **Yes** to save the changes you made back to Groove.

To specify the download settings for a folder in the Files tool

1. In the **Folders** pane of the **Files** tool, click the folder.
2. On the **File** menu, click **Folder Download Settings**.
3. On the **General** tab of the **Properties** dialog box, click **Limited Automatic Download**. Increase the size threshold if you want or specify a fractional value (.5 MB, for example). Then click **OK**.

To set permissions for the Files tool

1. On the **File** menu, point to **Properties**, and then click **Tool**.
2. On the **Permissions** tab of the **Files Properties** dialog box, in the **Select a role to modify its permissions** list, select the role you want to set permissions for.
3. In the list of permissions, select or clear the check boxes you want, and then click **OK**.

To set permissions for a specific folder

1. In the **Folders** list, right-click a folder, and click **Properties**.
2. On the **Permissions** tab of the **Properties** dialog box, in the **Select a role to modify its permissions** list, select the role you are setting permissions for.
3. In the list of permissions, select or clear the check boxes you want, and then click **OK**.

To specify alert settings for the Files tool

1. On the **File** menu, point to **Properties**, and then click **Tool**.
2. On the **Alerts** tab of the **Files Properties** dialog box, move the slider to the setting you want, and then click **OK**.

To specify alert settings for a folder

1. In the **Folders** pane, right-click the folder you want, and then click **Properties**.
2. On the **Alerts** tab of the **Properties** dialog box, move the slider to the setting you want, and then click **OK**.

To specify alert settings for a file

1. In the **Folders** pane, click the file.
2. On the **File** menu, click **Properties**, and then click **File**.
3. On the **Alerts** tab of the **Properties** dialog box, move the slider to the setting you want, and then click **OK**.

To create a file sharing workspace in Windows Vista

1. Right-click the folder you want to share, point to **Groove Folder Synchronization**, and then click **Start Synchronizing**.
2. In the confirmation message box that appears, click **Yes**.

To set up a file sharing workspace from the Groove Launchbar

1. On the **Launchbar**, click the **Workspaces** tab, and then click **New Workspace.**
2. In the **Create New Workspace** dialog box, click **File Sharing**.
3. In the **Name of Workspace** box, type a name for the workspace, and then click **OK**.
4. In the **Select A Folder For "<*workspace name*>"** dialog box, click **Create a new folder "<*workspace name*>" but let me select the location.** and then click **OK**.
5. In the **Browse For Folder** dialog box, click your user name, click the *Documents* folder, and then click **OK**.

To change roles and permissions for a file sharing workspace

1. In the **Synchronization Tasks** task pane, click **Show Properties for "<*workspace name*>"**.
2. On the **Roles** tab of the **Properties** dialog box, select the member whose role you want to change, and then click **Change Role**.
3. In the **Change Role** dialog box, select the new role, and then click **OK**.
4. On the **Permissions** tab of the **Properties** dialog box, in the **Select role to modify its permissions** list, select the role you want to modify.
5. In the list of permissions, select or clear the check boxes you want, and then click **OK**.

To set properties in a file sharing workspace

1. In the **File and Folder Tasks** task pane, click **Edit This Folder's Download Settings**.
2. In the **Properties** dialog box, click **Manual Download**, and then click **OK**.

3. Browse to the folder where the file you want to share is located, and then click the file.
4. In the **File and Folder Tasks** task pane, click **Show this file's properties**.
5. In the **Properties** dialog box, select the check box you want, and then click **OK**.
6. In the **File and Folder Tasks** task pane, click **Set Alerts for this file**.
7. Move the slider to set the alert level to the setting you want, and then click **OK**.

Part IX Collaboration

27 Enabling Collaboration by Using SharePoint

To create a SharePoint site as a subsite of an existing site

1. Display the parent site. On the **Site Actions** menu, click **Create**.
2. On the **Create** page, in the **Web Pages** list, click **Sites and Workspaces**.
3. On the **New SharePoint Site** page, in the **Title and Description** area, enter the site name in the **Title** box and an optional description in the **Description** box.
4. In the **Web Site Address** area, in the **URL name** box, type the site-specific designator that will be appended to the end of the parent site URL.
5. In the **Template Selection** area, click each tab to see the available site and workspace templates. Then on the tab that has the template you want to use, click the template.
6. In the **Permissions**, **Navigation**, and **Navigation Inheritance** areas of the **New SharePoint Site** page, select the options you want.
7. At the top or bottom of the **New SharePoint Site** page, click **Create**.

To view the existing storage structure of a SharePoint site

➜ On the **Quick Launch**, click **View All Site Content**.

To create a document library with versioning turned on

1. Display the site. On the **Site Actions** menu, click **Create**.
2. On the **Create** page, in the **Libraries** list, click **Document Library**.
3. On the **New** page, type a name for the library in the **Name** box, and an optional description in the **Description** box.
4. In the **Document Version History** area, click **Yes** to turn on versioning.
5. At the bottom of the **New** page, click **Create**.

To limit the number of versions retained in history

1. Display the document library. In the **Settings** list, click **Document Library Settings**.
2. On the **Customize** page, in the **General Settings** list, click **Versioning settings**.
3. On the **Document Library Versioning Settings** page, in the **Document Version History** area, select the **Keep the following number of major versions** check box. Then in the box below, enter the number of versions you want to keep.

To create a folder in a document library

1. Display the document library. In the **New** list, click **New Folder**.
2. On the **New Folder** page, enter a folder name in the **Name** box.
3. At the top or bottom of the **New Folder** page, click **OK**.

To upload one document to a document library

1. Display the document library. On the toolbar, click the **Upload** button (or in the **Upload** list, click **Upload Document**).
2. On the **Upload Document** page, in the **Upload Document** area, click the **Browse** button.
3. In the **Choose file** dialog box, navigate to the folder where the document is stored, click the document, and then click **Open**.
4. At the bottom of the **Upload Document** page, click **OK**.

To upload multiple documents to a document library

1. Display the document library. Click the **Upload** arrow, and then in the list, click **Upload Multiple Documents**.
2. In the left pane of the **Upload Document** page, navigate to the folder where the files you want are stored.
3. In the right pane, select the check boxes for the files you want.
4. At the bottom of the **Upload Document** page, click **OK**. Then in the Internet Explorer message box prompting you to confirm the upload, click **Yes**.

To delete a document from a document library

1. Point to the file name, click the arrow that appears, and then on the **Edit** menu, click **Delete**.
2. In the **Windows Internet Explorer** message box asking you to confirm the deletion, click **OK**.

To edit a document stored in a document library

- Check out the file, edit it, and then check it back in, entering comments to be saved as part of the version history.
- Open a read-write version of the file for editing, edit it, and then save your changes.
- Open a read-only version of the file, click the Edit Document (or Edit Presentation, Edit Workbook, and so on) button that appears below the Ribbon, edit the document, and then save your changes.

To check out a file and open it for editing, and then check it back in

1. Point to the file name, click the arrow that appears, and then on the **Edit** menu, click **Check Out**.
2. In the **Microsoft Internet Explorer** message box, select the **Use my local drafts folder** check box if it isn't already selected, and then click **OK**.
3. Open the file from the *SharePoint Drafts* folder, or from the document library.
4. After making any changes you want to the document, close it. In the **Microsoft Office Word** message box asking whether to save your changes, click **Yes**. Then in the **Microsoft Office Word** message box asking whether to check in the file, click **Yes**.
4. In the **Version Comments** box, type a summary of changes you made. Then click **OK**.

To open a read-write version of a document

➜ In the document library, point to the file, click the arrow that appears, and then on the **Edit** menu, click **Edit in Microsoft Office Word** (or the appropriate program).

To open a read-only version of a document

➜ In the document library, click the file name or icon.

To restore a file to the previous version

1. In the document library, point to the file name, click the arrow that appears, and then on the **Edit** menu, click **Version History**.
2. On the **Version History** page, point to the version you want to restore to, click the arrow that appears, and then on the **Edit** menu, click **Restore**.
3. In the **Windows Internet Explorer** message box asking you to confirm that you want to replace the current file with this version, click **Yes**.

To import data from an Excel workbook as a SharePoint list

1. On the **Site Actions** menu, click **Create**.
2. On the **Create** page, in the **Custom Lists** list, click **Import Spreadsheet**.
3. On the **New** page, type a name for the list in the **Name** box, and an optional description in the **Description** box.
4. In the **Import from Spreadsheet** area, click the **Browse** button.
5. In the **Choose file** dialog box, navigate to the folder where the workbook is stored, click the workbook, and then click **Open**.
6. At the bottom of the **New** page, click **Import**.
7. In the **Import to Windows SharePoint Services List** dialog box, select the data range you want to import as a list. Then click **Import**.

To import or link a SharePoint list to an Access database

1. Open the Access database you want to import or link the list to. Then on the **External Data** tab, in the **Import** group, click the **SharePoint List** button.
2. On the **Select the source and destination of the data** page of the **Get External Data** wizard, in the **Specify a SharePoint site** area, click the address of the site you want to connect to, or type it in the box below.
3. Click **Import the source data** or **Link to the data source**, and click **Next**. Then, if prompted to do so, enter your site credentials.
4. In the **Import** column of the **Import Data From List**, select the check box of each list you want to import into the database.
5. In the **Items to Import** column, for each of the selected lists, select the view (arrangement of data) that you want to import into the database.
6. With the **Import display values instead of IDs for fields that look up values stored in another list** check box selected, click **OK**.
7. If you want to save the import parameters for reuse, select the **Save import steps** check box. On the **Save Import Steps** page, enter a name and description for the specification, and then click **Save Import**.

To publish an Office document to a document workspace

1. Click the **Microsoft Office Button**, point to **Publish**, and then click **Create Document Workspace**.
2. In the **Location for new workspace** box of the **Document Management** task pane, type the URL of the site (not of a specific page). Then click **Create**.
3. If you are asked to supply your user name and password to connect to the site, enter your SharePoint site credentials in the **User name** and **Password** boxes, and click **OK**.

To view a document workspace from the document

➜ At the top of the **Document Management** task pane, below **Book Series**, click **Open site in browser**.

To delete a document workspace from the document

1. At the top of the **Document Management** task pane, point to the name of the workspace, and then click the arrow that appears.
2. In the list, click **Delete Workspace**, and then click **Yes** to confirm the deletion.

To store slides in a slide library

1. In PowerPoint, click the **Microsoft Office Button**, point to **Publish**, and then click **Publish Slides**.
2. In the **Publish Slides** dialog box, select the check box for the slide you want to store in the library. Or, right-click a slide that you want to publish and then click **Publish Slides** to display the dialog box with that slide already selected.
3. If the URL of your SharePoint slide library does not appear in the **Publish To** box, click the box and type the URL. Then click **Publish** to store the slide in the slide library.

To insert a slide from a slide library

1. Click the slide after which you want the new slide to appear.
2. On the **Home** tab, in the **Slides** group, click the **New Slide** arrow, and then in the list, click **Reuse Slides**.
3. In the **Reuse Slides** task pane, in the **Insert slide from** box, type the URL of your SharePoint slide library, and then click the **Go** arrow.
4. Double-click the thumbnail of the slide you want to insert in the active presentation.

To create a document workspace from Outlook

1. Open a new message window, address the message to the people you want to invite to the document workspace, and enter the message subject.
2. On the **Message** tab, in the **Include** group, click the **Attach File** button.
3. In the **Insert File** dialog box, browse to and select the file you want to share through the document workspace, and then click **Insert**.
4. Click the **Include** dialog box launcher.
5. In the **Send attachments as** area of the **Attachment Options** task pane, click **Shared attachments**.
6. In the **Create Document Workspace at** box, type the URL of your SharePoint site (or if the site address appears in the list, click it), and then press the Tab key.
7. When an invitation to the document workspace that will be created when you send the e-mail message appears in the content area, send the message.

To copy document library contents to Outlook

1. Display the document library. On the **Actions** menu, click **Connect to Outlook**. If an **Internet Explorer Security** alert appears, click **Allow**.
2. In the message box that appears, click **Yes**. If a **Connect** dialog box appears, prompting you for your site credentials, enter your user name and password, and then click **OK**.

To modify a document from Outlook and then merge the changes into the original version in the document library

1. In the SharePoint Lists folder, open the item you want to change.
2. To make changes, click **Edit Offline**.
3. To transfer changes from the offline file to the file in the document library, save your changes, close the file, and then reopen it. In the **Edit Offline** message box that appears, click **Update**.

To link a SharePoint calendar to Outlook

1. Display the calendar. On the **Actions** menu, click **Connect to Outlook**. If an **Internet Explorer Security** alert appears, click **Allow**.
2. In the **Microsoft Office Outlook** message box asking you to confirm that you want to connect the SharePoint calendar to Outlook, click **Yes**. If a **Connect** dialog box prompts you for your site credentials, enter your user name and password, and then click **OK**.

To subscribe to an RSS feed for a library or list

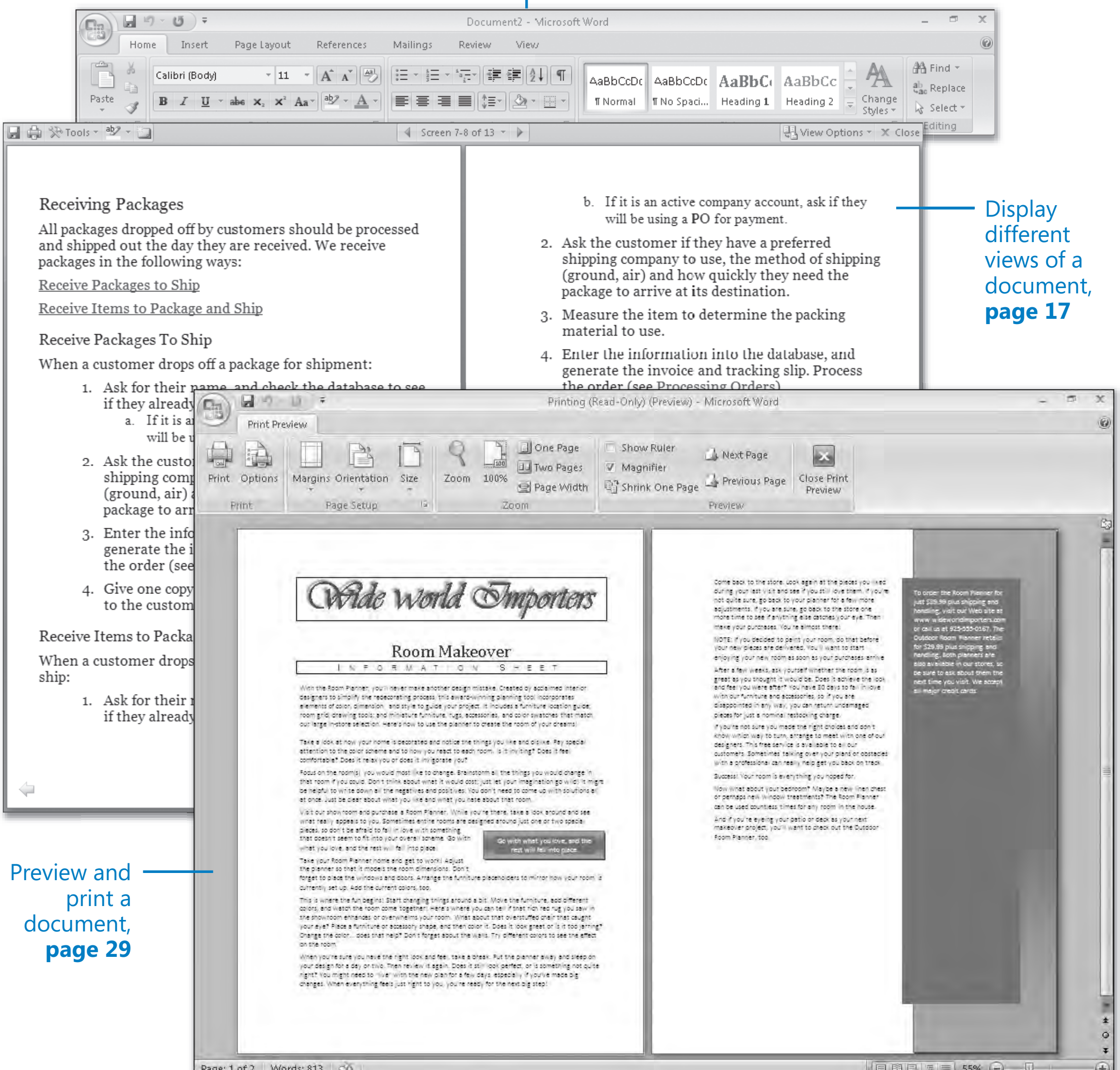
1. Display the library or list. In the **Actions** list, click **View RSS Feed**.
2. In the yellow box at the top of the RSS feed page of the selected document library or list, click **Subscribe to this feed**.
3. In the **Internet Explorer** message box asking you to confirm that you want to add the RSS feed to the *Feeds* folder in your Favorites Center, click **Subscribe**.

Part I

Microsoft Office Word 2007

Chapter at a Glance

Work in the Word environment, **page 4**



Display different views of a document, **page 17**

Preview and print a document, **page 29**

1 Exploring Word 2007

In this chapter, you will learn to:

- ✔ Work in the Word environment.
- ✔ Open, move around in, and close a document.
- ✔ Display different views of a document.
- ✔ Create and save a document.
- ✔ Preview and print a document.

When you use a computer program to create, edit, and produce text documents, you are ***word processing***. Microsoft Office Word 2007 is one of the most sophisticated word-processing programs available today. With Word 2007, it is easier than ever to efficiently create a wide range of business and personal documents, from the simplest letter to the most complex report. Word includes many ***desktop publishing*** features that you can use to enhance the appearance of documents so that they are appealing and easy to read. The program has been completely redesigned to make these and other powerful features more accessible. As a result, even novice users will be able to work productively in Word after only a brief introduction.

In this chapter, you will first familiarize yourself with the Word working environment. Then you will open an existing Word document, learn ways of moving around in it, and close it. You will explore various ways of viewing documents so that you know which view to use for different tasks and how to tailor the program window to meet your needs. You will create and save a new document and then save an existing document in a different location. Finally, you will preview and print a document.

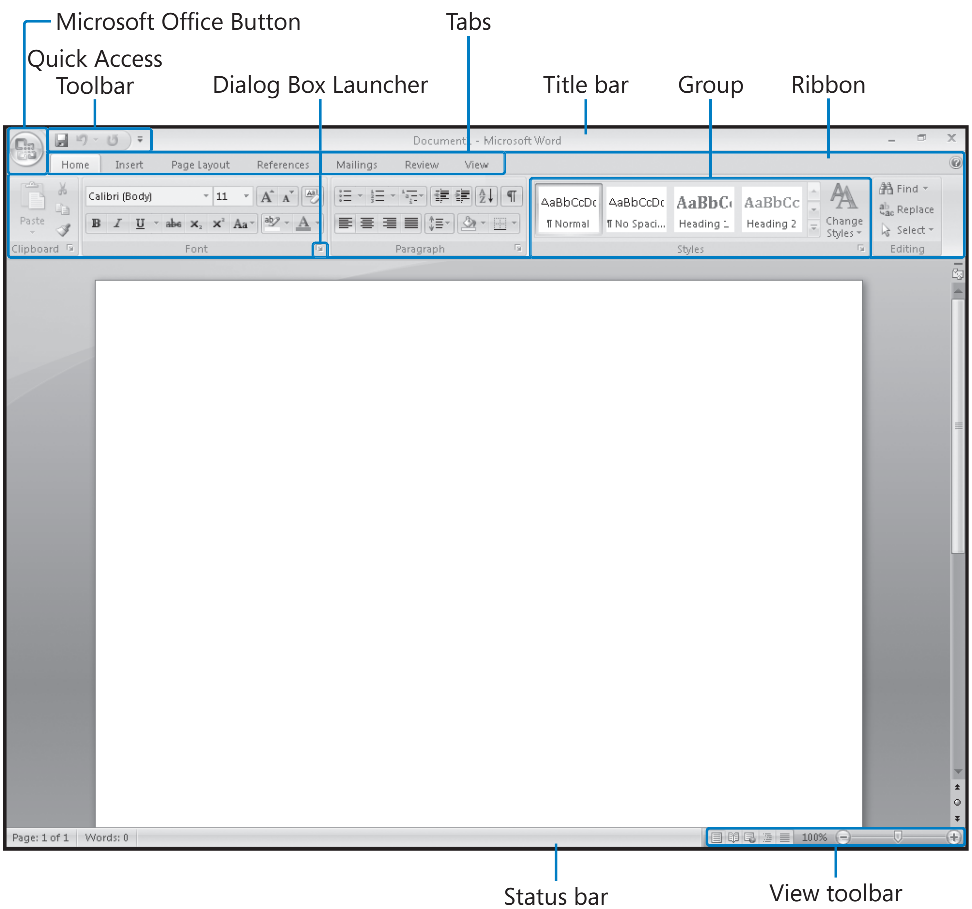
See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

> **Important** Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Working in the Word Environment

As with all programs in the 2007 Microsoft Office release, the most common way to start Word is from the Start menu displayed when you click the Start button at the left end of the Windows taskbar. If Word is the first program in the 2007 Office system that you have used, you are in for a surprise! The look of the program window has changed radically from previous versions.



> **Tip** What you see on your screen might not match the graphics in this book exactly. The screens in this book were captured on a monitor set to a resolution of 1024 × 768 pixels with the Windows taskbar hidden to increase the display space.

The new Word environment is designed to more closely reflect the way people generally work with the program. When you first start Word, this environment consists of the following elements:


Microsoft Office Button

- Commands related to managing Word and Word documents as a whole (rather than document content) are gathered together on a menu that is displayed when you click the ***Microsoft Office Button***.
- Commands can be represented as buttons on the ***Quick Access Toolbar*** to the right of the Microsoft Office Button. By default, this toolbar displays the Save, Undo, and Repeat buttons, but you can customize the toolbar to include any command that you use frequently.
- The ***title bar*** displays the name of the active document. At the right end of the title bar are the three familiar buttons that have the same function in all Windows programs. You can temporarily hide the Word window by clicking the Minimize button, adjust the size of the window with the Restore Down/Maximize button, and close the active document or quit Word with the Close button.
- Below the title bar is the ***Ribbon***, which makes all the capabilities of Word available in one area so that you can work efficiently with the program.
- Commands related to working with document content are represented as buttons on the ***tabs*** that make up the Ribbon. The Home tab is active by default. Clicking one of the other tabs, such as Insert, displays that tab's buttons.

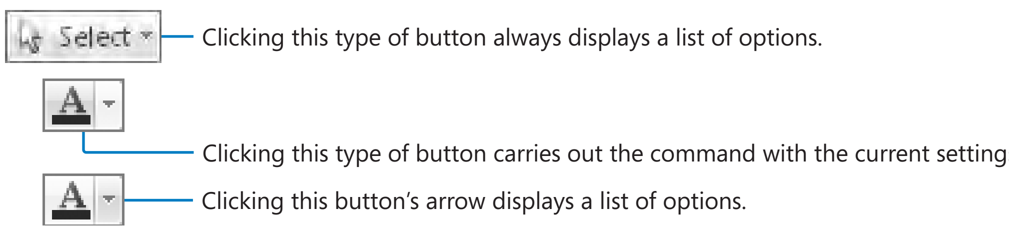
  > **Tip** If Microsoft Outlook with Business Contact Manager is installed on your computer, you will have a Business Tools tab in addition to those shown in our graphics.

- On each tab, buttons are organized into ***groups***. Depending on the size of the program window, in some groups the button you are likely to use most often is bigger than the rest.

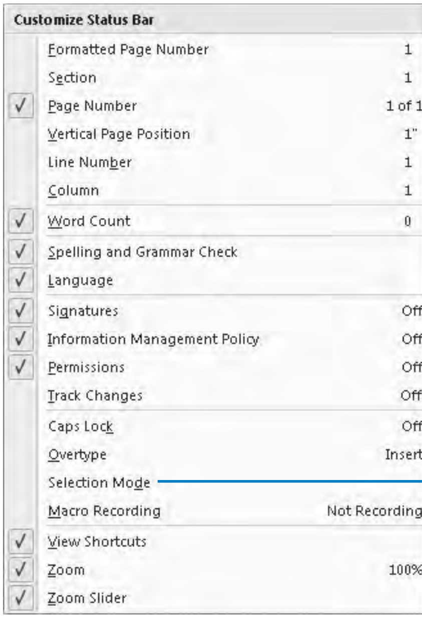
> **Tip** Depending on your screen resolution and the size of the program window, a tab might not have enough room to display all of its groups. In that case, the name of the group resembles a button, and clicking the button displays the group's commands.


Dialog Box Launcher

- Related but less common commands are not represented as buttons in the group. Instead they are available in a dialog box, which you can display by clicking the ***Dialog Box Launcher*** at the right end of the group's title bar.
- Some button names are displayed and some aren't. Pausing the mouse pointer over any button for a few seconds (called ***hovering***) displays a ***ScreenTip*** with not only the button's name but also its function.
- Some buttons have arrows, but not all arrows are alike. If you point to a button and both the button and its arrow are in the same box and are the same color, clicking the button will display options for refining the action of the button. If you point to a button and the button is in one box and its arrow is in a different box with a different shade, clicking the button will carry out that action with the button's current settings. If you want to change those settings, you need to click the arrow to see the available options.



- The ***Microsoft Office Word Help button*** appears at the right end of the Ribbon.
- You create a document in the ***document window***. When more than one document is open, each document has its own window.
- Across the bottom of the program window, the ***status bar*** gives you information about the current document. You can turn off the display of an item of information by right-clicking the status bar and then clicking that item.



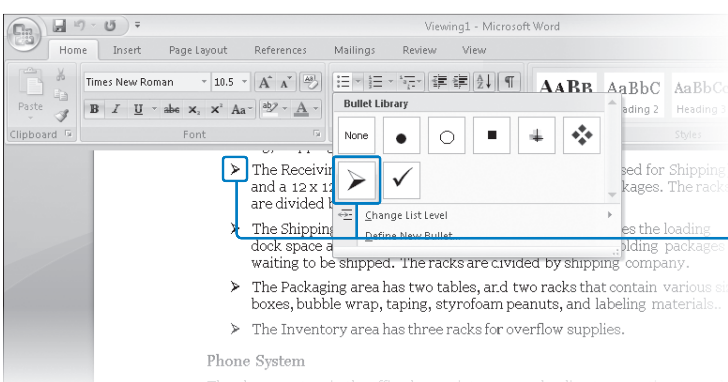
Click this item to display it on the status bar.

- At the right end of the status bar is the ***View toolbar***, which provides tools for adjusting the view of document content.

  See Also For information about adjusting the view of a document, see "Displaying Different Views of a Document" later in this chapter.

The goal of the redesigned environment is to make working on a document more intuitive. Commands for tasks you perform often are no longer hidden on menus and in dialog boxes, and features that you might not have discovered before are now more visible.

For example, when a formatting option has several choices available, they are often displayed in a ***gallery*** of ***thumbnails***. These galleries give you an at-a-glance picture of each choice. If you point to a thumbnail in a gallery, an awesome new feature called ***Live Preview*** shows you what that choice will look like if you apply it to your document.



When you point to a thumbnail, Live Preview shows the effect of that choice on the document.

In this exercise, you will start Word and explore the Microsoft Office Button and the tabs and groups on the Ribbon. Along the way, you will see how to take advantage of galleries and live preview. There are no practice files for this exercise.

BE SURE TO start your computer, but don't start Word yet.


Start

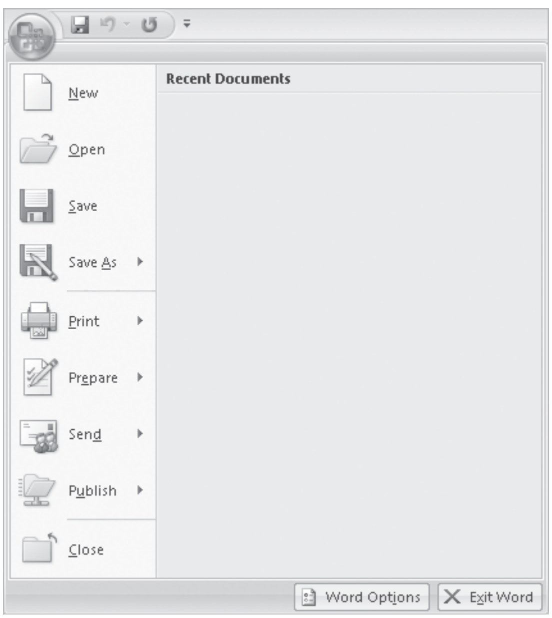

Microsoft Office Button

1. On the taskbar, click the **Start** button, click **All Programs**, click **Microsoft Office**, and then click **Microsoft Office Word 2007**.

   The Word program window opens, displaying a blank document.

2. Click the **Microsoft Office Button**.

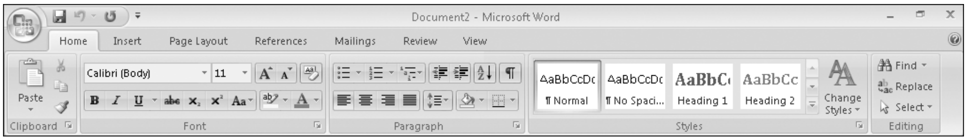
   Commands related to managing documents (such as creating, saving, and printing) are available from the menu that opens. This menu, which we refer to throughout this book as the ***Office menu***, takes the place of the File menu that appeared in previous versions of Word.

   The commands on the left are for tasks related to the document as a whole. After you have worked with a document, its name appears in the Recent Documents list so that you can quickly open it again. At the bottom of the menu are buttons for changing program options and for exiting Word.

3. Press the Esc key to close the menu.

   On the Ribbon, the Home tab is active. Buttons related to working with document content are organized on this tab in five groups: Clipboard, Font, Paragraph, Styles, and Editing. Only the buttons representing commands that can be performed on the currently selected document element are active.

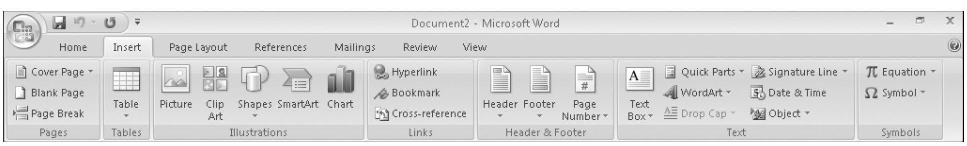


4. Point to the active buttons on this tab to display the ScreenTips that name them and describe their functions.

> **Important** Depending on your screen resolution and the size of the program window, you might see more or fewer buttons in each of the groups, or the buttons you see might be represented by larger or smaller icons than those shown in this book. Experiment with the size of the program window to understand the effect on the appearance of the tabs.

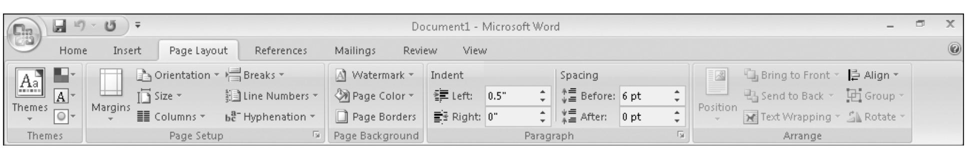
5. Click the **Insert** tab, and then explore its buttons.

   Buttons related to all the items you can insert are organized on this tab in seven groups: Pages, Tables, Illustrations, Links, Header & Footer, Text, and Symbols.



6. Click the **Page Layout** tab, and then explore its buttons.

   Buttons related to the appearance of your document are organized on this tab in five groups: Themes, Page Setup, Page Background, Paragraph, and Arrange.



7. In the **Page Setup** group, display the ScreenTip for the **Margins** button.

   The ScreenTip tells you how you can adjust the margins.


Dialog Box Launcher

8. At the right end of the **Page Setup** group's title bar, click the **Page Setup** Dialog Box Launcher.

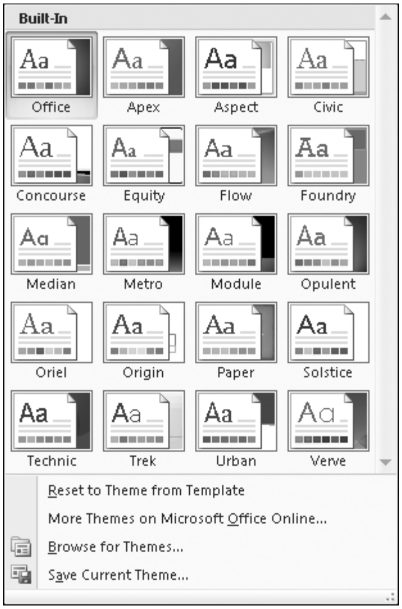
   The Page Setup dialog box opens.

   The dialog box provides a single location where you can set the margins and orientation, and specify the setup of a multi-page document. You can preview the results of your changes before applying them.

9. Click **Cancel** to close the dialog box.

10. In the **Themes** group, click the **Themes** button.

You see a gallery of thumbnails of the available themes.



11. Press Esc to close the gallery without making a selection.

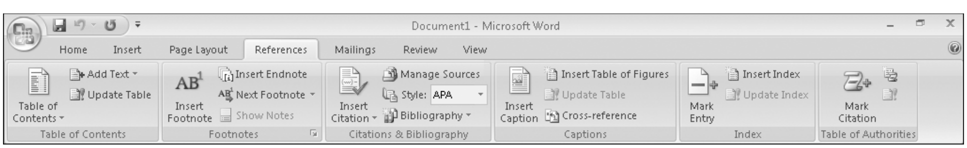
12. In the **Page Background** group, click the **Page Color** button, and then in the top row of the **Theme Colors** palette, point to each box in turn.

    The blank document page shows a live preview of what it will look like if you click the color you are pointing to. You can see the effect of the selection without actually applying it.

13. Press Esc to close the palette without making a selection.

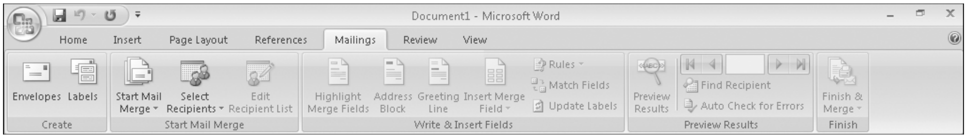
14. Click the **References** tab, and then explore its buttons.

    Buttons related to items you can add to long documents, such as reports, are organized on this tab in six groups: Table Of Contents, Footnotes, Citations & Bibliography, Captions, Index, and Table Of Authorities.



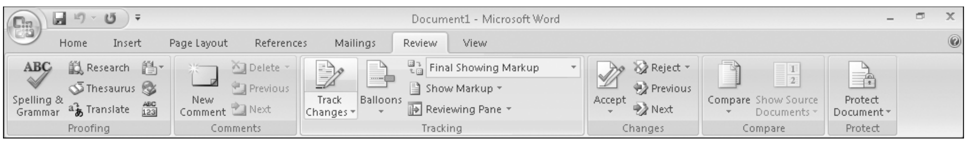
15. Click the **Mailings** tab, and then explore its buttons.

Buttons related to creating mass mailings are organized on this tab in five groups: Create, Start Mail Merge, Write & Insert Fields, Preview Results, and Finish.



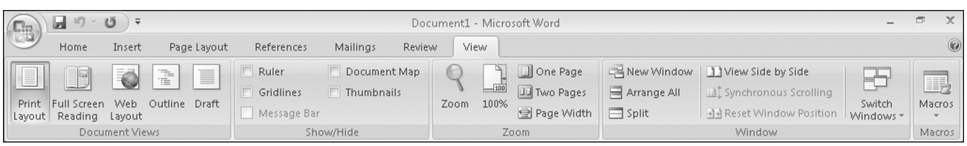
16. Click the **Review** tab, and then explore its buttons.

Buttons related to proofing, commenting, and changing documents are organized on this tab in six groups: Proofing, Comments, Tracking, Changes, Compare, and Protect.



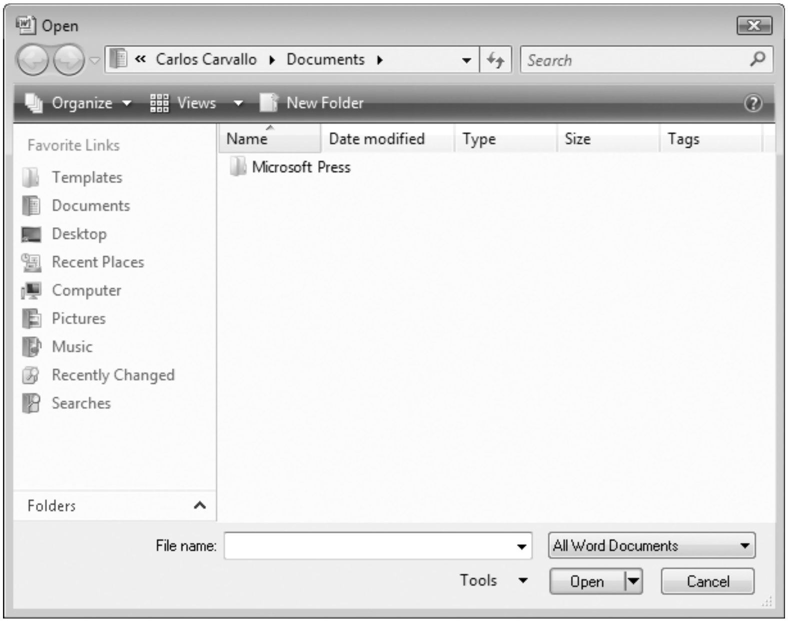
17. Click the **View** tab, and then explore its buttons.

Buttons related to changing the view or the display of documents are organized on this tab in five groups: Document Views, Show/Hide, Zoom, Window, and Macros.



Opening, Moving Around in, and Closing a Document

To open an existing document, you click the Microsoft Office Button and then click Open to display the Open dialog box. The first time you use this command, the dialog box displays the contents of your *Documents* folder. If you display the dialog box again in the same Word session, it displays the contents of whatever folder you last used. To see the contents of a different folder, you use standard Windows techniques. After you locate the file you want to work with, you can double-click it to open it.



Tip Clicking a file name and then clicking the Open arrow in the lower-right corner of the Open dialog box displays a list of alternative ways in which you can open the file. To look through the document without making any inadvertent changes, you can open the file as ***read-only***, or you can open an independent copy of the file. You can open an file in a Web browser, or open an XML file with a transform. In the event of a computer crash or other similar incident, you can tell Word to open the file and attempt to repair any damage. And you can display earlier versions of the file.

To move around in an open document without changing the location of the insertion point, you can use the vertical and horizontal scroll bars in the following ways:

- Click the scroll arrows to move the document window up or down by a line, or left or right by a few characters.
- Click above or below the vertical scroll box to move up or down one windowful, or to the left or right of the horizontal scroll box to move left or right one windowful.
- Drag the scroll box on the scroll bar to display the part of the document corresponding to the location of the scroll box. For example, dragging the scroll box to the middle of the scroll bar displays the middle of the document.

You can also move around in a document in ways that do move the insertion point. To place the insertion point at a particular location, you simply click there. To move the insertion point back or forward a page, you can click the Previous Page and Next Page buttons below the vertical scroll bar.

You can also press a key or a ***key combination*** on the keyboard to move the insertion point. For example, you can press the Home key to move the insertion point to the left end of a line or press Ctrl+Home to move it to the beginning of the document.

> **Tip** The location of the insertion point is displayed on the status bar. By default, the status bar tells you which page the insertion point is on, but you can also display its location by section, line, and column, and in inches from the top of the page. Simply right-click the status bar, and then click the option you want to display.

This table lists ways to use your keyboard to move the insertion point.

To move the insertion point	Press
Left one character	Left Arrow
Right one character	Right Arrow
Down one line	Down Arrow
Up one line	Up Arrow
Left one word	Ctrl+Left Arrow
Right one word	Ctrl+Right Arrow
To the beginning of the current line	Home
To the end of the current line	End
To the beginning of the document	Ctrl+End
To the beginning of the previous page	Ctrl+Page Up
To the beginning of the next page	Ctrl+Page Down
Up one screen	Page Down
Down one screen	Page Up

In a long document, you might want to move quickly among elements of a certain type; for example, from graphic to graphic. You can click the Select Browse Object button at the bottom of the vertical scroll bar and then make a choice in the palette of browsing options that appears, such as Browse By Page or Browse By Graphic.

If more than one document is open, you can close it by clicking the Close button at the right end of the title bar. If only one document is open, clicking the Close button closes the document and also exits Word. If you want to close the document but leave Word open, you must click the Microsoft Office Button and then click Close.

In this exercise, you will open an existing document and explore various ways of moving around in it. Then you will close the document.

USE the *Opening* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordExploring* folder.

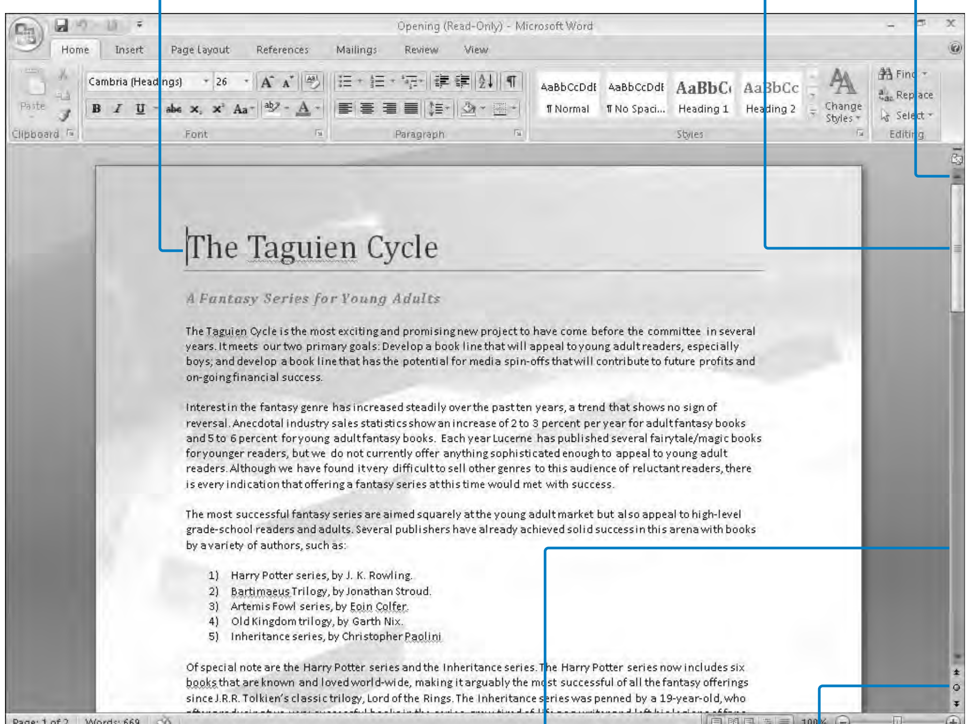

Microsoft Office Button

1. Click the **Microsoft Office Button**, and then click **Open**.

   The Open dialog box opens, showing the contents of the folder you used for your last open or save action.

2. If the contents of the *Documents* folder are not displayed, in the **Navigation Pane**, click **Documents**.
3. Double-click the *Microsoft Press* folder, double-click the *2007OfficeSBS* folder, and then double-click the *WordExploring* folder.
4. Click the *Opening* document, and then click the **Open** button.

   The *Opening* document opens in the Word program window.

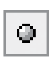


5. In the second line of the document title, click at the end of the paragraph to position the insertion point.
6. Press the Home key to move the insertion point to the beginning of the line.
7. Press the → key two times to move the insertion point to the beginning of the word *Fantasy* in the heading.
8. Press the End key to move the insertion point to the end of the line.
9. Press Ctrl+End to move the insertion point to the end of the document.
10. Press Ctrl+Home to move the insertion point to the beginning of the document.


Next Page

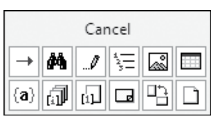
11. At the bottom of the vertical scroll bar, click the **Next Page** button.
12. Click above the vertical scroll box to change the view of the document by one windowful.
13. Drag the vertical scroll box to the top of the vertical scroll bar.

    The beginning of the document comes into view. Note that the location of the insertion point has not changed—just the view of the document.


Select Browse Object

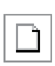
14. Click to the left of the title to place the insertion point at the top of the document, and then at the bottom of the vertical scroll bar, click the **Select Browse Object** button.

    A palette of browse choices opens.



15. Move the pointer over the buttons representing the objects you can browse among.

    As you point to each button, the name of the object appears at the top of the palette.


Browse by Page

16. Click the **Browse by Page** button.

    The insertion point moves from the beginning of page 1 to the beginning of page 2.

17. Click the **Microsoft Office Button**, and then click **Close**.

> **Troubleshooting** If you click the Close button at the right end of the title bar instead of clicking the Microsoft Office Button and then clicking Close, you will close the open Word document and exit the Word program. To continue working, start Word again.

Compatibility with Earlier Versions

Word 2007 uses a different file format than previous versions of the program. You can open a document created with previous versions, but the new features of Word 2007 will not be available. The name of the document appears in the title bar with [Compatibility Mode] to its right. You can work in Compatibility Mode, or you can convert the document to the Word 2007 file format by clicking the Microsoft Office Button, and clicking Convert. You can then click the Save button on the Quick Access Toolbar to overwrite the existing document, or click Save As on the Office menu to save the document in the new format as a different file.

You cannot open a Word 2007 document in a previous version of Word unless you install the Compatibility Pack for the 2007 Office system, which is available for free download from Microsoft Office Online. After installing the Compatibility Pack, you can open and work with Word 2007 documents, but you cannot open Word 2007 templates.

Displaying Different Views of a Document

In Word, you can view a document in a variety of ways:

- ***Print Layout view***. This view displays a document on the screen the way it will look when printed. You can see elements such as margins, page breaks, headers and footers, and watermarks.
- ***Full Screen Reading view***. This view displays as much of the content of the document as will fit on the screen at a size that is comfortable for reading. In this view, the Ribbon is replaced by one toolbar at the top of the screen with buttons that you can use to save and print the document, access references and other tools, highlight text, and make comments. You can also move from page to page and adjust the view.
- ***Web Layout view***. This view displays a document on the screen the way it will look when viewed in a Web browser. You can see backgrounds, AutoShapes, and other effects. You can also see how text wraps to fit the window and how graphics are positioned.
- ***Outline view***. This view displays the structure of a document as nested levels of headings and body text, and provides tools for viewing and changing its hierarchy.

See Also For information about outlining, see "Reorganizing a Document Outline" in Chapter 2, "Editing and Proofreading Documents."

- ***Draft view***. This view displays the content of a document with a simplified layout so that you can type and edit quickly. You cannot see layout elements such as headers and footers.

You switch among views by using buttons in the Document Views group on the View tab or by using the buttons on the View toolbar in the lower-right corner of the window.

You can use other buttons on the View tab to do the following:

- Display rulers and gridlines to help you position and align elements.
- Display a separate pane containing the ***Document Map***—a list of the headings that make up the structure of the document—while viewing and editing its text.
- Display a separate pane containing thumbnails of the document's pages.
- Arrange and work with windows.
- Change the magnification of the document.

You can also adjust the magnification of the document by using tools on the View toolbar at the right end of the status bar. You can click the Zoom button and select (or type) a percentage; drag the slider to the left or right; or click the Zoom Out or Zoom In button at either end of the slider.

When you are creating more complex documents, it is easier to place elements exactly if you turn on the display of non-printing characters. These characters fall into two categories: those that control the layout of your document and those that provide the structure for behind-the-scenes processes such as indexing. You can turn the display of non-printing characters on and off by clicking the Show/Hide ¶ button in the Paragraph group on the Home tab.

Tip You can hide any text by selecting it, clicking the Font Dialog Box Launcher at the right end of the Font group's title bar on the Home tab, selecting the Hidden check box, and clicking OK. When the Show/Hide ¶ button is turned on, hidden text is visible and is identified in the document by a dotted underline.

In this exercise, you will first explore various ways that you can customize Print Layout view to make the work of developing documents more efficient. You will turn white space on and off, zoom in and out, display the rulers and Document Map, and view non-printing characters and text. Then you will switch to other views, noticing the differences so that you have an idea of which one is most appropriate for which task. Finally, you will switch between open documents and view documents in more than one window at the same time.

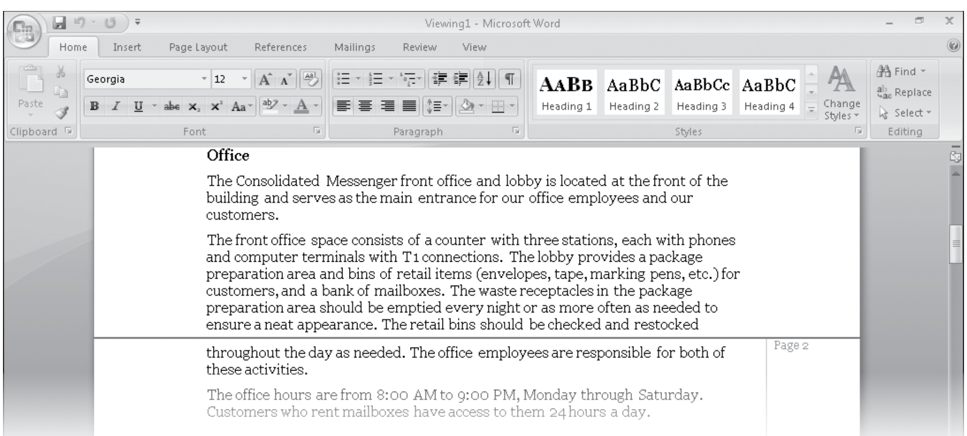
> **USE** the *Viewing1* and *Viewing2* documents. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\WordExploring* folder.
>
> **OPEN** the *Viewing1* document.

1. In **Print Layout** view, scroll through the document.

   As you can see, on all pages but the first, the printed document will have the title in the header at the top of the page, the page number in the right margin, and the date in the footer at the bottom of each page.

2. Point to the gap between any two pages, and when the pointer changes to two opposing arrows, double-click the mouse button. Then scroll through the document again.

   The white space at the top and bottom of each page and the gray space between pages is now hidden.

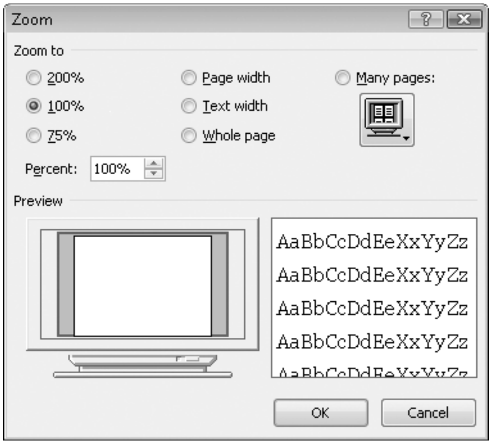


3. Restore the white space by pointing to the black line that separates one page from the next, double-clicking the mouse button.

Zoom

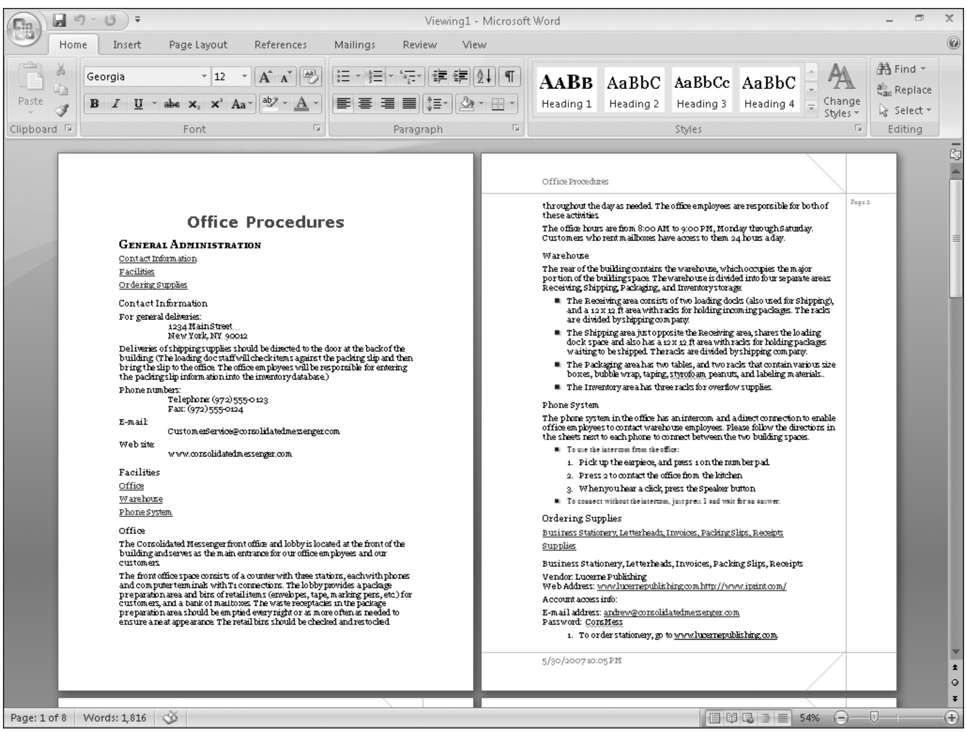
4. Press Ctrl+Home to move to the top of the document, and then on the **View** toolbar, click the **Zoom** button.

The Zoom dialog box opens.



5. Below **Many pages**, click the monitor button, click the second page thumbnail in the top row, and then click **OK**.

   The magnification changes so that you can see two pages side by side.




Next Page

6. Below the vertical scroll bar, click the **Next Page** button to display the third and fourth pages of the document.

7. On the **View** toolbar, click the **Zoom** button. Then in the **Zoom** dialog box, click **75%**, and click **OK**.

   Notice that the Zoom slider position is adjusted to reflect the new setting.


Zoom Out

8. At the left end of the **Zoom** slider, click the **Zoom Out** button a couple of times.

   As you click the button, the slider moves to the left and the Zoom percentage decreases.


Zoom In

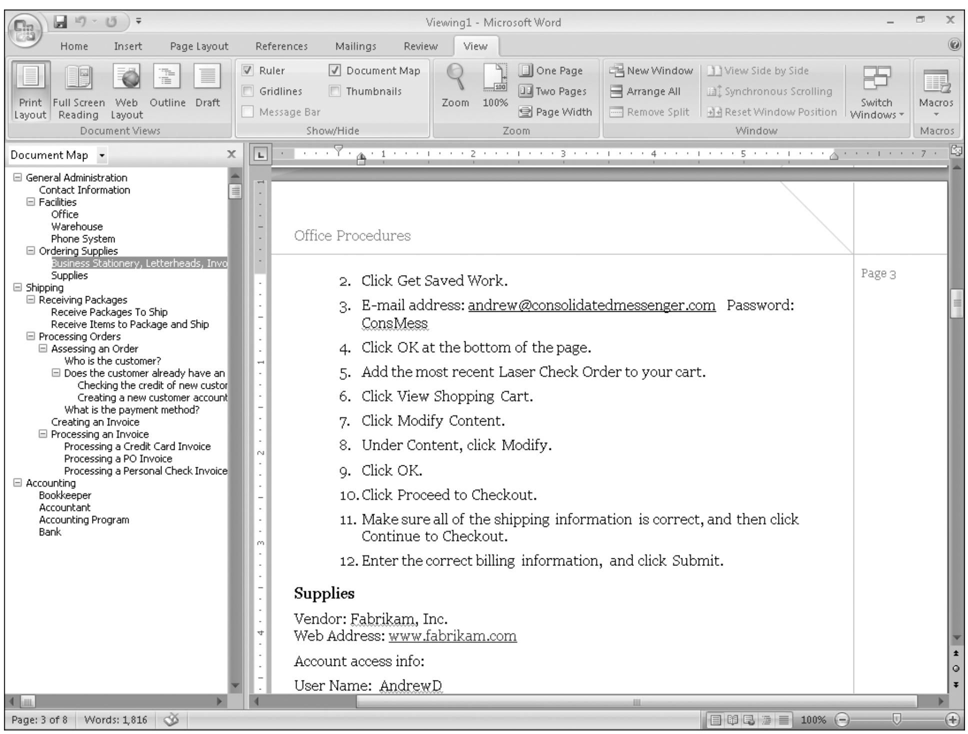
9. At the right end of the **Zoom** slider, click the **Zoom In** button until the magnification is 100%.

10. On the **View** tab, in the **Show/Hide** group, select the **Ruler** check box.

    Horizontal and vertical rulers appear above and to the left of the page. On the rulers, the active area of the page is white and the margins are blue.

11. In the **Show/Hide** group, click the **Document Map** check box.

    A pane opens on the left side of the screen, displaying an outline of the headings in the document. The heading of the active section is highlighted.



12. In the **Document Map**, click the **Shipping** heading.

    Word displays the page containing the selected heading.

13. In the **Show/Hide** group, click the **Thumbnails** check box, and then scroll the **Thumbnails** pane, and click page **5**.

Close

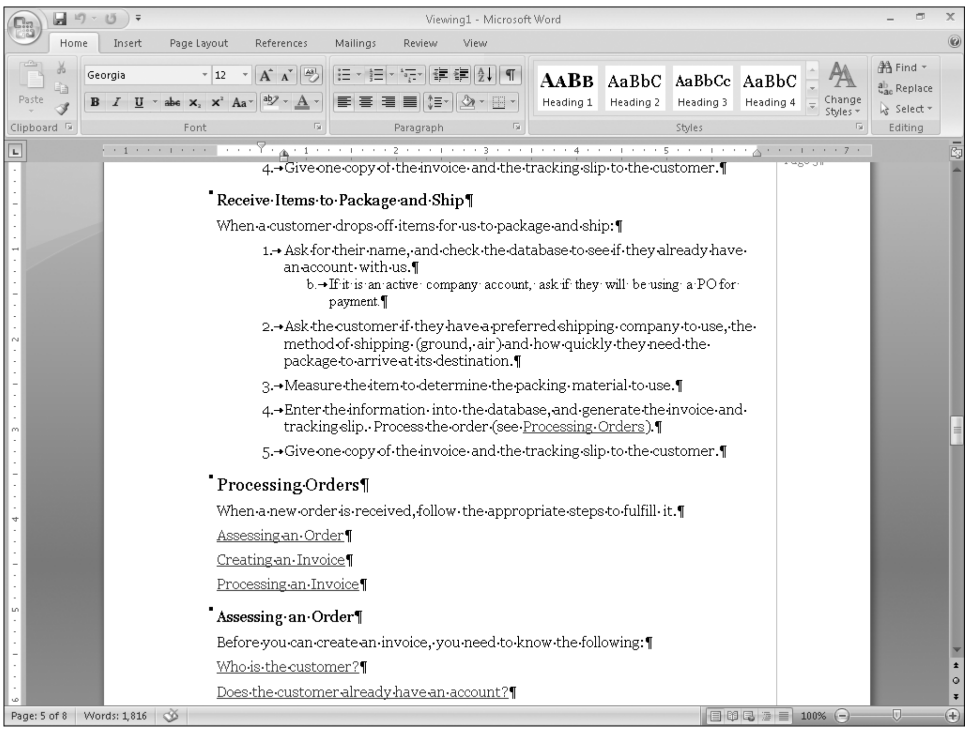
14. In the **Thumbnails** pane, click the **Close** button.

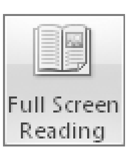
    The pane on the left closes.

Show/Hide ¶

15. On the **Home** tab, in the **Paragraph** group, click the **Show/Hide** ¶ button.

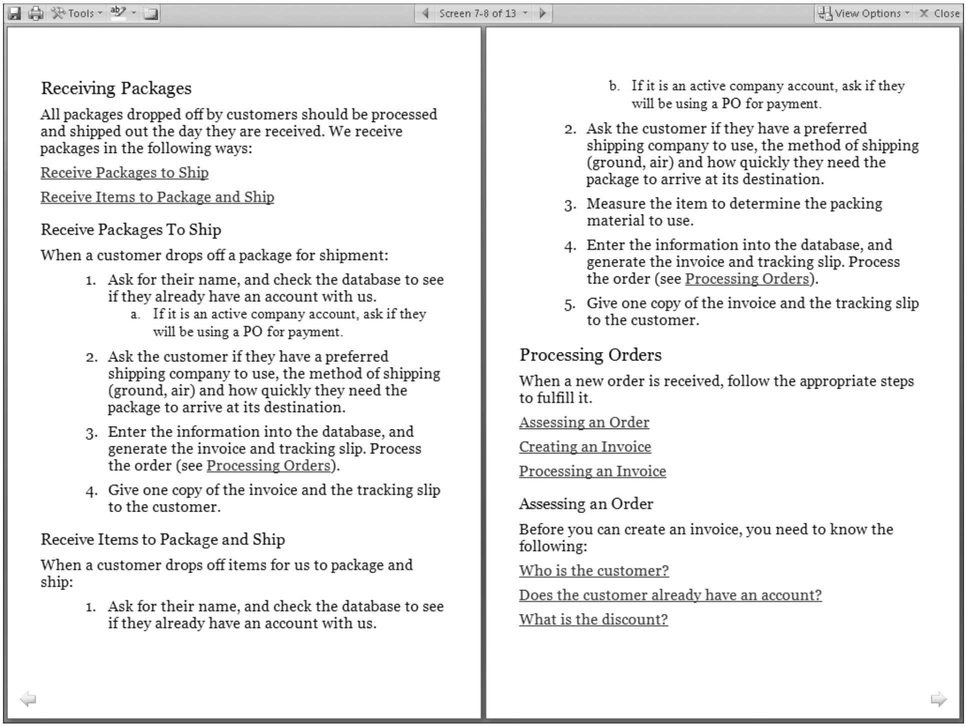
    You can now see non-printing characters such as spaces, tabs, and paragraph marks.





16. On the **View** tab, in the **Document Views** group, click the **Full Screen Reading** button.

    The screen changes to display the document in a format that makes it easy to read.




Next Screen

17. At the top of the screen, click the **Next Screen** button.

You move to the next two screens of information.

18. Explore the other buttons at the top of the Full Screen Reading view, and then click the **Close** button to return to Print Layout view.


Web Layout

19. Press Ctrl+Home. Then on the **View** toolbar, click the **Web Layout** button, and scroll through the document.

In a Web browser, the text column will fill the window and there will be no page breaks.

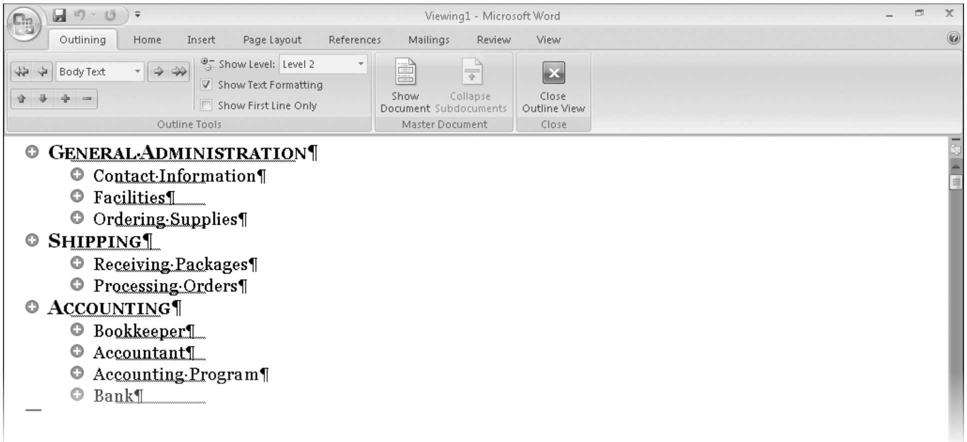

Outline

20. Press Ctrl+Home, and then on the **View** toolbar, click the **Outline** button.

The screen changes to show the document's hierarchical structure, and the Outlining tab appears at the left end of the Ribbon.

21. On the **Outlining** tab, in the **Outline Tools** group, click the **Show Level** arrow, and in the list, click **Level 2**.

The document collapses to display only the Level 1 and Level 2 headings.




Draft

22. On the **View** toolbar, click the **Draft** button, and then scroll through the document.

You can see the basic content of the document without any extraneous elements, such as margins and headers and footers. The active area on the ruler indicates the width of the text column, dotted lines indicate page breaks, and scrolling is quick and easy.


Microsoft Office Button

23. Click the **Microsoft Office Button**, click **Open**, and then in the **Open** dialog box, double-click *Viewing2*.

The *Viewing2* document opens in Print Layout view in its own document window. Notice that the telephone number in the body of the memo has a dotted underline because it is formatted as hidden.

24. On the **Home** tab, in the **Paragraph** group, click the **Show/Hide ¶** button to turn it off.

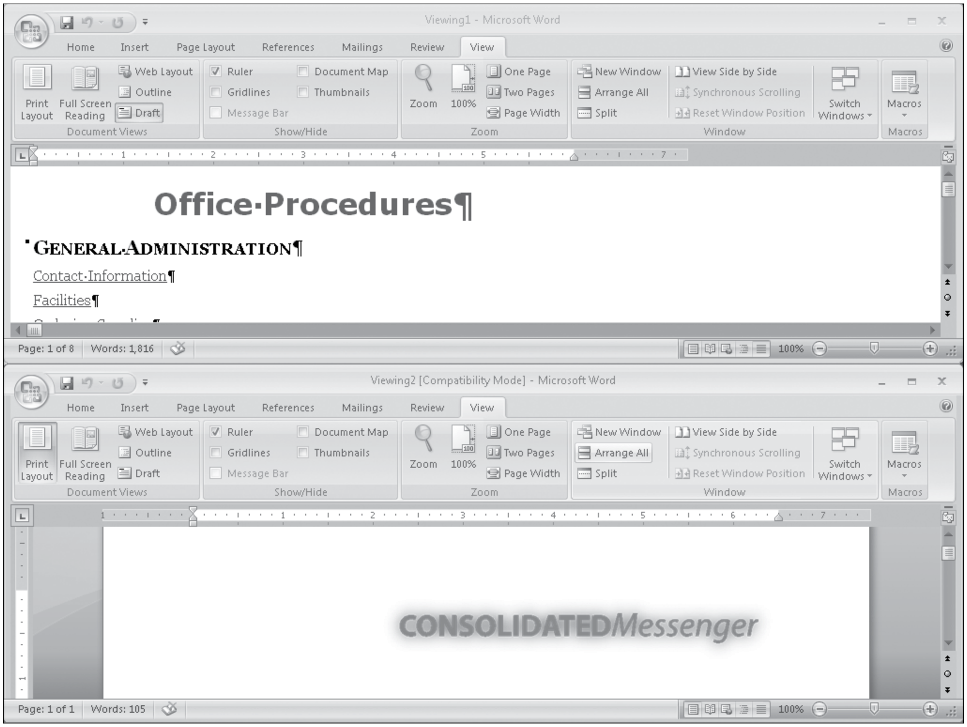
Non-printing characters and hidden text are no longer visible.

25. On the **View** tab, in the **Window** group, click **Switch Windows**, and then click *Viewing1*.

The other open document is displayed in Draft view, with non-printing characters visible.

26. On the **View** tab, in the **Window** group, click the **Arrange All** button.

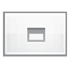
The two document windows are sized and stacked one above the other. Each window has a Ribbon, so you can work with each document independently.




Close

27. At the right end of the *Viewing1* window's title bar, click the **Close** button.

Clicking the Close button does not quit Word because more than one document is open.


Maximize

28. At the right end of the *Viewing2* window's title bar, click the **Maximize** button.

The document window expands to fill the screen.

29. On the **View** tab, in the **Show/Hide** group, clear the **Ruler** check box to turn off the rulers.

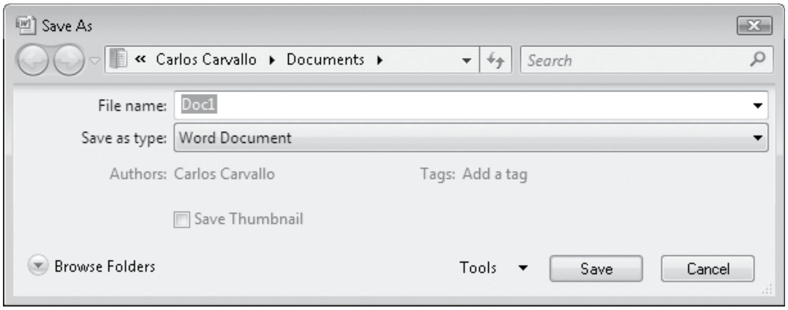
CLOSE the *Viewing2* document.

Creating and Saving a Document

To create a Word document, you simply open a new blank document and type your content. The blinking insertion point shows where the next character you type will appear. When the insertion point reaches the right margin, the word you are typing

moves to the next line. Because of this ***word wrap*** feature, which is common in word-processing and desktop-publishing programs, you press Enter only to start a new paragraph, not a new line.

Each document you create is temporary unless you save it as a file with a unique name or location. To save a document for the first time, you click the Save button on the Quick Access Toolbar or click the Microsoft Office Button and then click Save. Either action displays the Save As dialog box, where you can assign the name and storage location.



If you want to save the document in a folder other than the one shown in the Address bar, you can click the chevrons to the left of the current folder name and then navigate to the folder you want. You can also click Browse Folders to display the Navigation Pane and a toolbar. If you want to create a new folder in which to store the file, you can click the New Folder button on this toolbar.

After you save a document the first time, you can save changes simply by clicking the Save button. The new version of the document then overwrites the previous version. If you want to keep both the new version and the previous version, click Save As on the Office menu, and then save the new version with a different name in the same location or with the same name in a different location. (You cannot store two files with the same name in the same folder.)

In this exercise, you will enter text in a new document, and you will save the document in a folder that you create. There are no practice files for this exercise.

BE SURE TO close any open documents before beginning this exercise.


Microsoft Office Button

1. Click the **Microsoft Office Button**, click **New**, and then in the **New Document** window, double-click **Blank Document**.

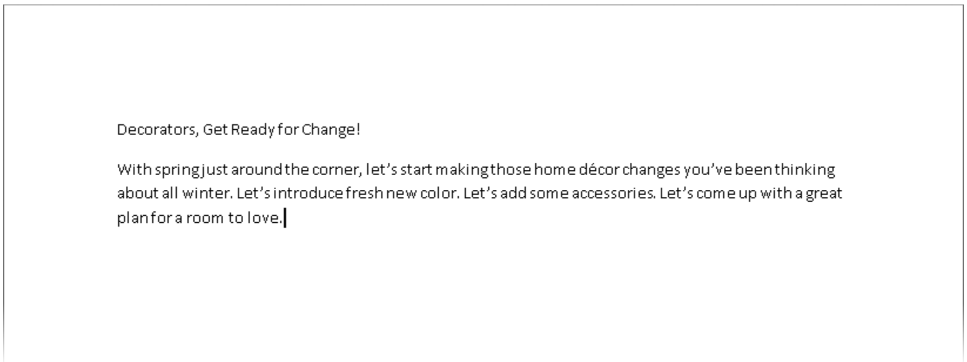
   A new document window opens in Print Layout view.

2. With the insertion point at the beginning of the new document, type **Decorators, Get Ready for Change!**, and then press Enter.

   The text appears in the new document.

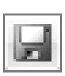
3. Type **With spring just around the corner, let's start making those home decor changes you've been thinking about all winter. Let's introduce fresh new color. Let's add some accessories. Let's come up with a great plan for a room to love.**

   Notice that you did not need to press Enter when the insertion point reached the right margin because the text wrapped to the next line.



> **Tip** If a red wavy line appears below a word or phrase, Word is flagging a possible error. For now, ignore any errors.

4. Press Enter, and then type **Here at Wide World Importers, we realize that you need to have the right tools to guarantee a successful room makeover. And with that in mind, we are proud to present the latest addition to our line of decorating tools, the Room Planner.**

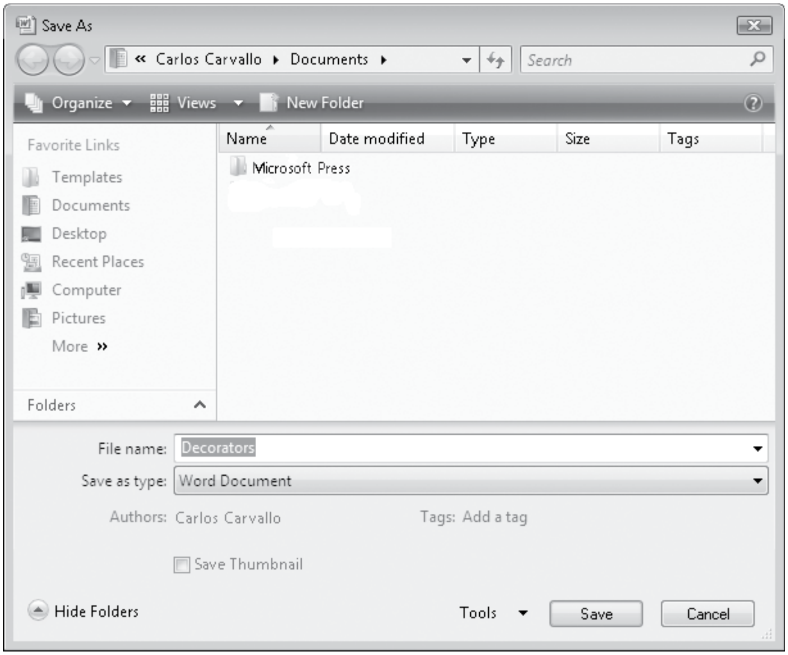

Save

5. On the **Quick Access Toolbar**, click the **Save** button.

   The Save As dialog box opens, displaying the contents of the *Documents* folder. In the File Name box, Word suggests *Decorators*, the first word in the document, as a possible name for this file.

6. In the lower-left corner of the dialog box, click Browse Folders.

   The dialog box expands to show the Navigation Pane and a toolbar.



7. Double-click *Microsoft Press*, double-click *2007OfficeSBS*, and double-click *WordExploring*.

8. On the dialog box's toolbar, click the **New Folder** button, type **My New Documents** as the name of the new folder, and then press Enter.

   My New Documents is now the current folder in the Save As dialog box.

9. In the **File name** box, double-click the existing entry, and then type **My Announcement**.

> **Troubleshooting** Programs that run on the Windows operating systems use file name extensions to identify different types of files. For example, the extension *.docx* identifies Word 2007 documents. Windows Vista programs do not display these extensions by default, and you shouldn't type them in the Save As dialog box. When you save a file, Word automatically adds whatever extension is associated with the type of file selected in the Save As Type box.

10. Click **Save**.

    The Save As dialog box closes, Word saves the *My Announcement* file in the *My New Documents* folder, and the name of the document, *My Announcement*, appears on the program window's title bar.

11. Click the **Microsoft Office Button**, and then click **Save As**.

The Save As dialog box opens, displaying the contents of the *My New Documents* folder.

12. In the Address bar in the **Save As** dialog box, click the chevrons to the left of *My New Documents*, and then in the list, click **WordExploring**.

    The dialog box now displays the contents of the *My New Documents* folder's *parent folder*, *WordExploring*.

13. Click **Save**.

    Word saves the *My Announcement* file in the *WordExploring* folder. You now have two versions of the document saved with the same name but in different folders.

CLOSE the *My Announcement* file.

Tip By default, Word periodically saves the document you are working on in case the program stops responding or you lose electrical power. To adjust the time interval between saves, click the Microsoft Office Button, click Word Options, click Save in the left pane of the Word Options window, and specify the period of time in the box to the right of the Save AutoRecover Information Every check box. Then click OK.

Previewing and Printing a Document

When you are ready to print a document, you can click the Microsoft Office Button, point to Print, and then click Quick Print. Word then uses your computer's default printer and the settings specified in the Print dialog box. To use a different printer or change the print settings, you click the Microsoft Office Button, and then click Print to open the Print dialog box. You can then specify which printer to use, what to print, and how many copies, and you can make other changes to the settings.

Before you print a document, you almost always want to see how it will look on paper by previewing it. Previewing is essential for multi-page documents but is helpful even for one-page documents. To preview a document, you click the Microsoft Office Button, point to Print, and then click Print Preview. This view shows exactly how each page of the document will look when printed. Word displays a Print Preview tab on the Ribbon to provide tools for checking each page and making adjustments if you don't like what you see.

By using the buttons in the Page Setup group on the Print Preview tab, you can make the three types of changes described on the following page.

- Change the margins of the document to fit more or less information on a page or to control where the information appears. You define the size of the top, bottom, left, and right margins by clicking the Margins button and making a selection from the Margins gallery, or by clicking Custom Margins and specifying settings on the Margins tab of the Page Setup dialog box.
- Switch the ***orientation*** (the direction in which a page is laid out on the paper). The default orientation is ***portrait***, in which the page is taller than it is wide. You can set the orientation to ***landscape***, in which the page is wider than it is tall, by clicking the Orientation button and selecting that option.

> **Tip** The pages of a document all have the same margins and are oriented the same way unless you divide your document into sections. Then each section can have independent margin and orientation settings.

- Select the paper size you want to use by clicking the Size button and making a selection in the Paper Size gallery.

You can click buttons in other groups to change the printer options, change the view of the document, and change the mouse pointer so that you can edit the text.

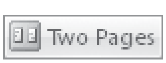
In this exercise, you will preview a document, adjust the margins, change the orientation, and select a new printer before sending the document to be printed.

> **USE** the *Printing* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordExploring* folder.
>
> **BE SURE TO** install a printer and turn it on before starting this exercise.
>
> **OPEN** the *Printing* document.

Microsoft Office Button

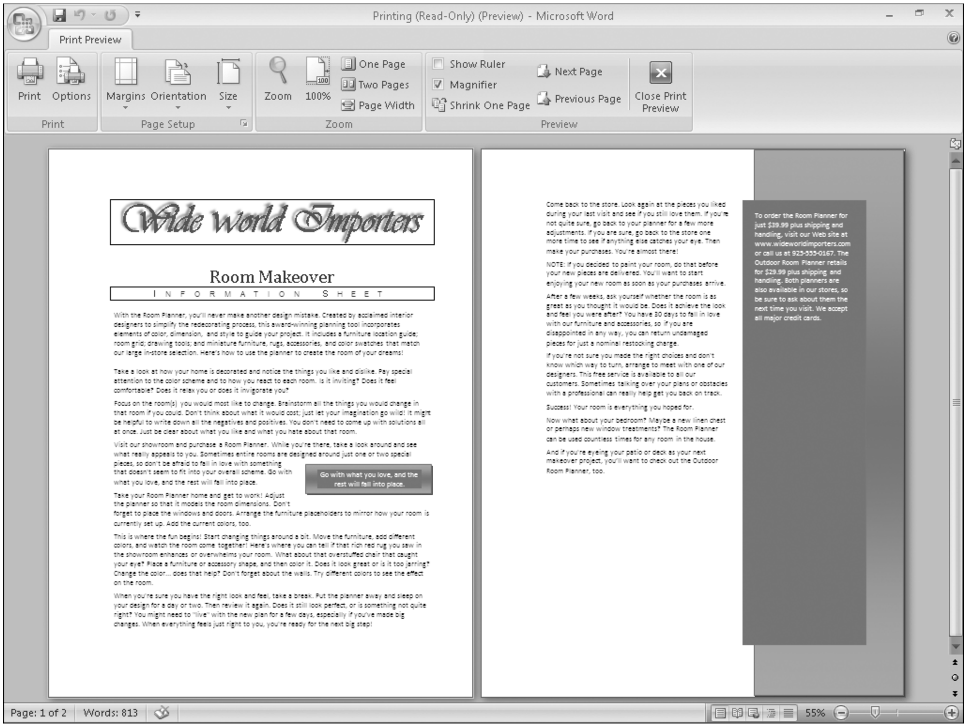
1. Click the **Microsoft Office Button**, point to the **Print** arrow, and then click **Print Preview**.

   The window's title bar now indicates that you are viewing a preview of the document, and the Print Preview tab appears on the Ribbon.



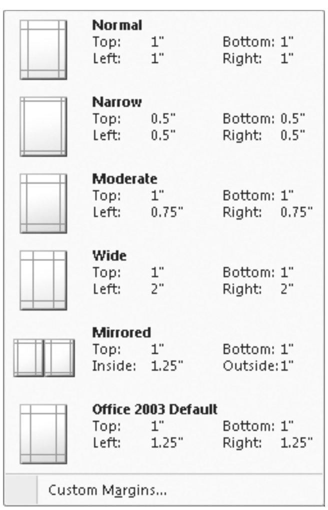
2. On the **Print Preview** tab, in the **Zoom** group, click the **Two Pages** button.

   Word displays the two pages of the document side by side.



3. In the **Page Setup** group, click the **Margins** button.

The Margins gallery appears.



4. In the gallery, click **Wide**.

   The text rewraps within the new margins, and the left end of the status bar indicates that the document now has three pages.

5. In the **Preview** group, click the **Next Page** button to see the last page of the document.

Dialog Box Launcher

6. Click the **Page Setup** Dialog Box Launcher.

   The Page Setup dialog box opens, displaying the Margins tab.

7. In the **Margins** area, replace the value in the **Left** box by typing **1"**. Then replace the value in the **Right** box with **1"**, and click **OK**.

   The width of the margins decreases, and the text rewraps to fill two pages.

8. In the **Page Setup** group, click the **Orientation** button, and then click **Landscape**.

   The pages of the document are now wider than they are tall.

9. Point to the top of the first page of the document so that the pointer becomes a magnifying glass, and then click.

   The first page is magnified. Notice that the Zoom box at the right end of the status bar now displays 100%.

10. Click near the top of the document.

    The Zoom percentage changes, and you now see both pages at the same time.

11. In the **Preview** group, click the **Close Print Preview** button.

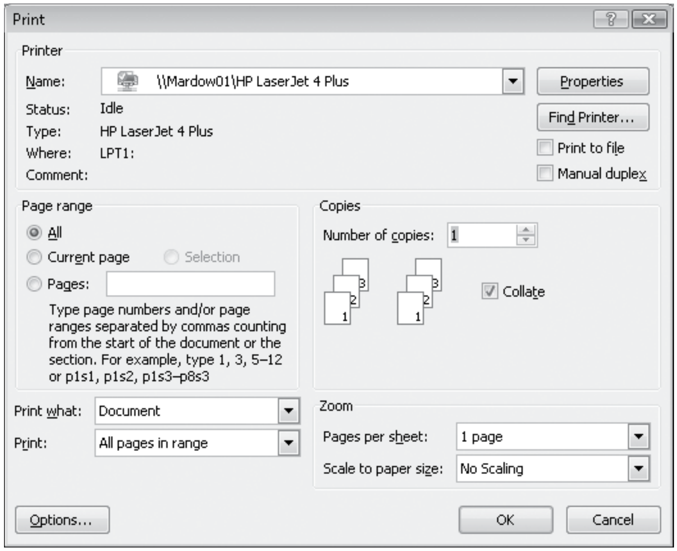
    You don't have to be in Print Preview to change the orientation of a document. You can do it in Print Layout view.

12. On the **Page Layout** tab, in the **Page Setup** group, click the **Orientation** button, and then click **Portrait**.

13. Click the **Microsoft Office Button**, and then click **Print**.

> **Tip** You can click the Microsoft Office Button, point to Print, and then click Quick Print to print the document without first viewing the settings.

The Print dialog box opens.



14. If you have more than one printer available and you want to switch printers, click the **Name** arrow, and in the list, click the printer you want.
15. In the **Page Range** area, click **Current Page**.
16. In the **Copies** area, change the **Number of copies** setting to 2, and then click **OK**.

    Word prints two copies of the first page on the designated printer.

CLOSE the *Printing* document without saving your changes, and if you are not continuing directly on to the next chapter, exit Word.

Key Points

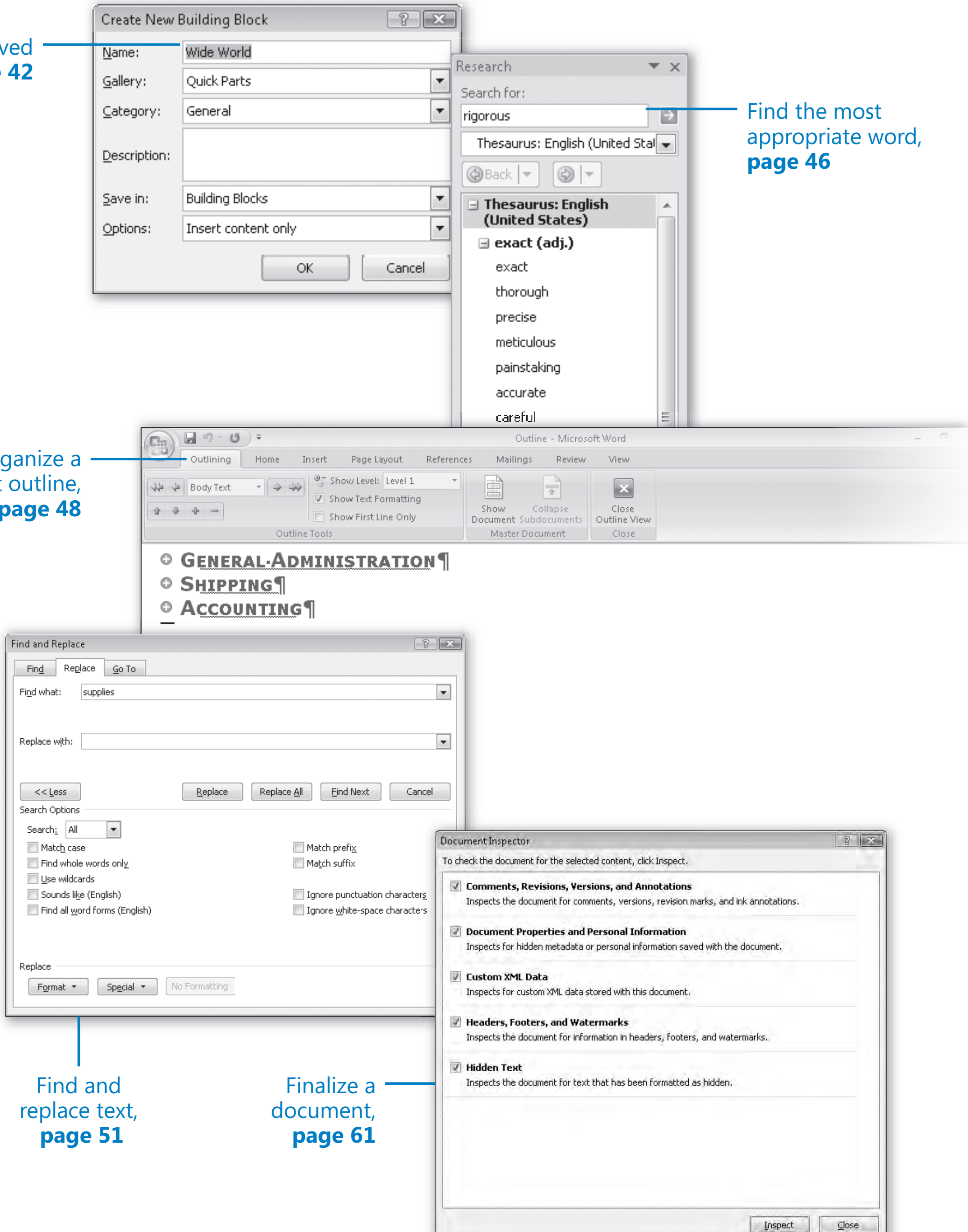
- You can open more than one Word document, and you can view more than one document at a time, but only one document can be active at a time.
- You create Word documents by typing text at the insertion point. It's easy to move the insertion point by clicking in the text or pressing keys and key combinations.
- When you save a Word document, you specify its name, location, and file format in the Save As dialog box.
- You can view a document in a variety of ways, depending on your needs as you create the document and on the purpose for which you are creating it.

Chapter at a Glance

Insert saved text, **page 42**

Find the most appropriate word, **page 46**

Reorganize a document outline, **page 48**



Find and replace text, **page 51**

Finalize a document, **page 61**

2 Editing and Proofreading Documents

In this chapter, you will learn to:

- ✔ Make changes to a document.
- ✔ Insert saved text.
- ✔ Find the most appropriate word.
- ✔ Reorganize a document outline.
- ✔ Find and replace text.
- ✔ Correct spelling and grammatical errors.
- ✔ Finalize a document.

Unless the documents you create are intended for no one's eyes but your own, you need to ensure that they are correct, logical, and persuasive. Whether you are a novice writer or an experienced writer, Microsoft Office Word 2007 has several tools that make creating professional documents easy and efficient:

- Editing tools provide quick-selection techniques and drag-and-drop editing to make it easy to move and copy text anywhere you want it.
- The building blocks feature can be used to save and recall specialized terms or standard paragraphs.
- Reference and research tools include a thesaurus that makes it easy to track down synonyms and research services that provide access to a variety of Web-based reference materials.
- Outlining tools allow easy rearranging of headings and text to ensure that your argument is logical.

- Search tools can be used to locate and replace words and phrases, either one at a time or throughout a document.
- The AutoCorrect and Spelling And Grammar features make it easy to correct typos and grammatical errors before you share a document with others.
- Finalizing tools ensure that a document is ready for distribution.

In this chapter, you will edit the text in a document by inserting and deleting text, copying and pasting a phrase, and moving a paragraph. You will save a couple of building blocks, and you'll rearrange a document in Outline view. You will find a phrase and replace one phrase with another throughout the entire document. You'll change an AutoCorrect setting and add a misspelled word to its list. You'll check the spelling and grammar in a document and add a term to the custom dictionary. Finally, you'll inspect a document for inappropriate information and mark it as final.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Making Changes to a Document

You will rarely write a perfect document that doesn't require any editing. You will almost always want to insert a word or two, change a phrase, or move text from one place to another. You can edit a document as you create it, or you can write it first and then revise it. Or you might want to edit a document that you created for one purpose so that it will serve a different purpose. For example, a letter from last year's marketing campaign might be edited to create a new letter for this year's campaign.

Inserting text is easy; you click to position the insertion point and simply begin typing. Any existing text to the right of the insertion point moves to make room for the new text.

What Happened to Overtype?

By default, Word is in Insert mode. In previous versions of Word, it was possible to accidentally switch to Overtype mode by inadvertently pressing the Insert key. In Overtype mode, existing text does not move to the right when you type new text; instead, each character you type replaces an existing character.

In Word 2007, you must deliberately switch to Overtype mode if you want to use it. Here's how:

1. Right-click the status bar, and then click **Overtype** to display the Insert mode status at the left end of the status bar.
2. Click **Insert** on the status bar.

   The word *Overtype* then replaces *Insert*. You can click the word to switch back to Insert mode when you have finished overtyping.

By default, pressing the Insert key has no effect on the mode. If you want the Insert key to turn Overtype mode on and off, follow these steps:

1. Click the **Microsoft Office Button**, and then click **Word Options**.
2. In the **Word Options** dialog box, click **Advanced** in the left pane, and then in the **Editing options** area, select the **Use the Insert key to control overtype mode** check box.
3. Click **OK**.

Deleting text is equally easy. If you want to delete only one or a few characters, you can simply position the insertion point and then press the Backspace or Delete key until the characters are all gone. Pressing Backspace deletes the character to the left of the insertion point; pressing Delete deletes the character to the right of the insertion point.

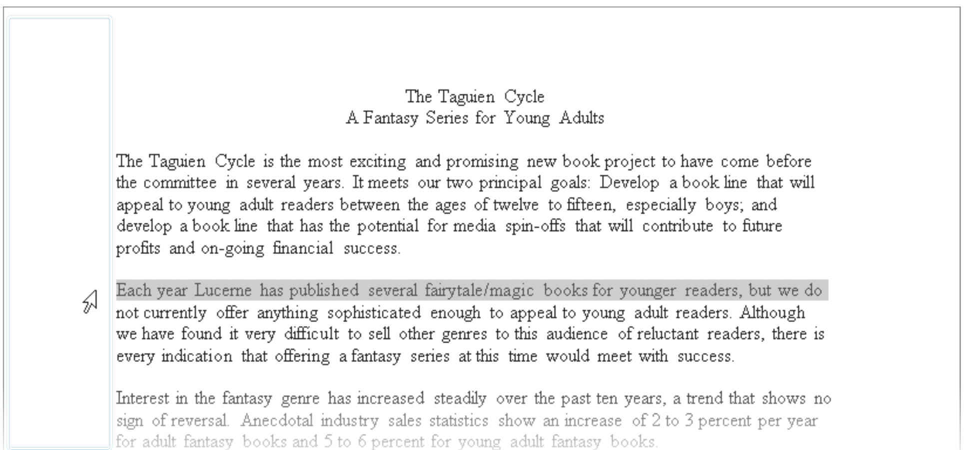
To delete more than a few characters efficiently, you need to know how to ***select*** the text. Selected text appears highlighted on the screen. You can select specific items as follows:

- To select a word, double-click it. Word selects the word and the space following it. It does not select punctuation following a word.
- To select a sentence, click anywhere in the sentence while holding down the Ctrl key. Word selects all the characters in the sentence, from the first character through the space following the ending punctuation mark.
- To select a paragraph, triple-click it.

You can select adjacent words, lines, or paragraphs by positioning the insertion point at the beginning of the text you want to select, holding down the Shift key, and then pressing the Arrow keys or clicking at the end of the text that you want to select. If you want to select words, lines, or paragraphs that are not adjacent, you make the first selection and then hold down the Ctrl key while selecting the next block.

As an alternative, you can use the ***selection area*** to quickly select various items. This is an invisible area in the document's left margin, where the pointer becomes a hollow right-pointing arrow. You can use the selection area as follows:

- To select a line, click the selection area to the left of the line.
- To select a paragraph, double-click the selection area to the left of the paragraph.
- To select an entire document, triple-click the selection area.



The Taguien Cycle
A Fantasy Series for Young Adults

The Taguien Cycle is the most exciting and promising new book project to have come before the committee in several years. It meets our two principal goals: Develop a book line that will appeal to young adult readers between the ages of twelve to fifteen, especially boys; and develop a book line that has the potential for media spin-offs that will contribute to future profits and on-going financial success.

Each year Lucerne has published several fairytale/magic books for younger readers, but we do not currently offer anything sophisticated enough to appeal to young adult readers. Although we have found it very difficult to sell other genres to this audience of reluctant readers, there is every indication that offering a fantasy series at this time would meet with success.

Interest in the fantasy genre has increased steadily over the past ten years, a trend that shows no sign of reversal. Anecdotal industry sales statistics show an increase of 2 to 3 percent per year for adult fantasy books and 5 to 6 percent for young adult fantasy books.

Selection area

After selecting the text you want to work with, simply press the Backspace or Delete key.

> **Tip** To deselect text, click anywhere in the document window except the selection area.

After selecting text, you can move or copy it in the following ways:

- Use the ***Clipboard*** when you need to move or copy text between two locations that you cannot see at the same time—for example, between pages or between documents. The Clipboard is a temporary storage area in your computer's memory. Select the text, and then click the Cut or the Copy button in the Clipboard group

on the Home tab. Then reposition the insertion point and click the Paste button to insert the selection in its new location. When you cut text, it is removed from its original location, and when you copy text, it remains in its original location.

See Also For more information, see the sidebar "About the Clipboard" later in this topic.

- Use ***drag-and-drop editing*** (frequently referred to simply as ***dragging***) when you need to move or copy text only a short distance—for example, within a paragraph or line. Dragging does not involve the Clipboard. Start by selecting the text. Then hold down the mouse button, drag the text to its new location, and release the mouse button. To copy the selection, hold down the Ctrl key while you drag.

If you make a change to a document and then realize that you made a mistake, you can easily reverse the change. You can undo your last editing action by clicking the Undo button on the Quick Access Toolbar. To undo an earlier action, click the Undo arrow, and then click that action in the list.

> **Tip** Clicking an action in the Undo list undoes that action and all the editing actions you performed after that one. You cannot undo a single action except the last one you performed.

If you undo an action and then change your mind, you can click the Redo button on the Quick Access Toolbar. You can redo only the last action that you undid.

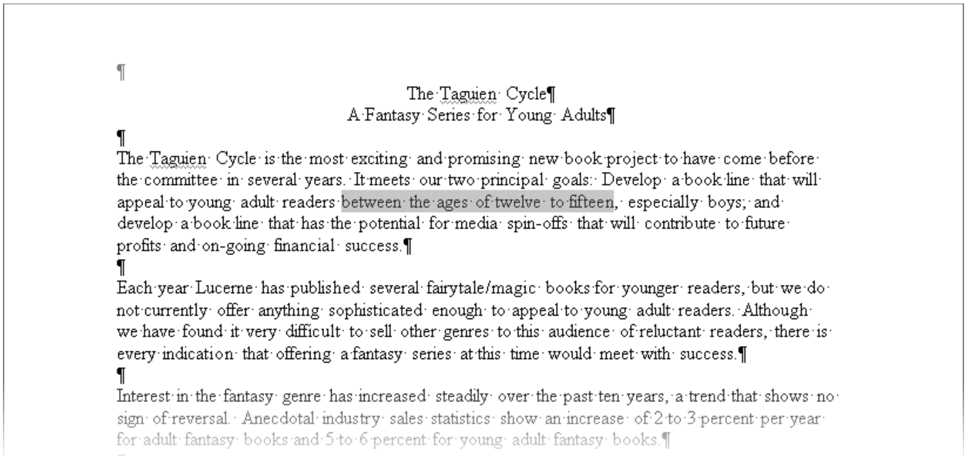
In this exercise, you will edit the text in a document. You'll insert and delete text, undo the deletion, copy and paste a phrase, and move a paragraph.

> **USE** the *Changes* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordEditing* folder.
>
> **BE SURE TO** start Word before beginning this exercise.
>
> **OPEN** the *Changes* document.


Show/Hide ¶

1. If non-printing characters are not visible in the document, on the **Home** tab, in the **Paragraph** group, click the **Show/Hide ¶** button.
2. In the third sentence of the first paragraph, click immediately to the left of the word **between**, hold down the Shift key, and then click immediately to the right of the word **fifteen** (and to the left of the comma that follows it).

   Word selects the text between the two clicks.



¶

The Taguien Cycle¶
A Fantasy Series for Young Adults¶

¶

The Taguien Cycle is the most exciting and promising new book project to have come before the committee in several years. It meets our two principal goals: Develop a book line that will appeal to young adult readers between the ages of twelve to fifteen, especially boys; and develop a book line that has the potential for media spin-offs that will contribute to future profits and on-going financial success.¶

¶

Each year Lucerne has published several fairytale/magic books for younger readers, but we do not currently offer anything sophisticated enough to appeal to young adult readers. Although we have found it very difficult to sell other genres to this audience of reluctant readers, there is every indication that offering a fantasy series at this time would meet with success.¶

¶

Interest in the fantasy genre has increased steadily over the past ten years, a trend that shows no sign of reversal. Anecdotal industry sales statistics show an increase of 2 to 3 percent per year for adult fantasy books and 5 to 6 percent for young adult fantasy books.¶

3. Press the Del key to delete the selection.

   Word also deletes the space before the selection.

4. Select the word **book** in the first sentence of the first paragraph by double-clicking it, and then press the Backspace key.

5. Double-click the word **principal** in the same paragraph, and then replace it by typing primary.

   Notice that you don't have to type a space after *primary*. Word inserts the space for you.

> **Tip** Word inserts and deletes spaces because the Use Smart Cut And Paste check box is selected on the Advanced page of the Word Options dialog box. If you want to be able to control the spacing yourself, click the Microsoft Office Button, click Word Options, click Advanced, clear this check box, and click OK.

6. Position the mouse pointer in the selection area to the left of the phrase *A Fantasy Series for Young Adults*, and then click once to select the entire line of text.

7. On the **Home** tab, in the **Clipboard** group, click the **Copy** button.

   The selection is copied to the Clipboard.

8. Click the **Next Page** button below the vertical scroll bar to move to the beginning of the next page, press the ↓ key, and then in the **Clipboard** group, click the **Paste** button (not its arrow).

   The Paste Options button appears below and to the right of the insertion. You can click this button if you want to change Word's default way of pasting, but in this case, you can just ignore it.

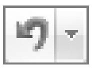
9. Return to page 1, and then in the numbered list, triple-click anywhere in the *Bartimaeus Trilogy* paragraph to select the entire paragraph.


Cut

10. In the **Clipboard** group, click the **Cut** button.
11. Press the ↑ key to move to the beginning of the *Harry Potter series* paragraph, and then in the **Clipboard** group, click the **Paste** button.

    The two paragraphs have effectively switched places and the list has been renumbered.

    See Also For more information about numbered lists, see "Creating and Modifying Lists" in Chapter 3, "Changing the Look of Text."


Undo

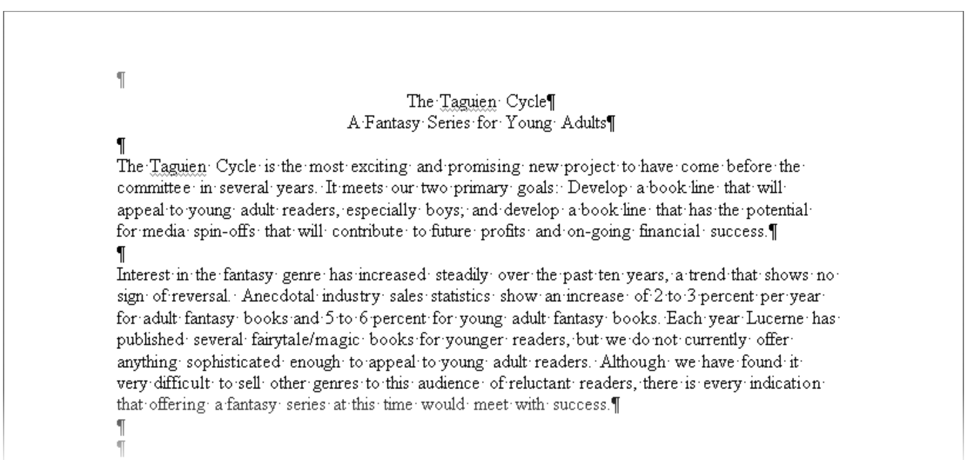
12. On the **Quick Access Toolbar**, click the **Undo** arrow, and in the list, click the third action (**Paste**).

    Word undoes the previous cut-and-paste operation and the pasting of the copied text.
13. Press Ctrl+Home to move to the top of the document. Then move the pointer into the selection area adjacent to the paragraph that begins *Interest in the fantasy genre*, and double-click to select the paragraph.
14. Point to the selection, hold down the mouse button, and then drag the paragraph up to the beginning of the paragraph above it.

    When you release the mouse, the text appears in its new location.
15. With the text still selected, press the End key.

    Word releases the selection and moves the insertion point to the end of the paragraph.
16. Press Space, and then press Del.

    Word deletes the paragraph mark, and the two paragraphs are now one paragraph.


¶

The·Taguien·Cycle¶
A·Fantasy·Series·for·Young·Adults¶

¶
The·Taguien·Cycle·is·the·most·exciting·and·promising·new·project·to·have·come·before·the·committee·in·several·years.·It·meets·our·two·primary·goals:·Develop·a·book·line·that·will·appeal·to·young·adult·readers,·especially·boys;·and·develop·a·book·line·that·has·the·potential·for·media·spin-offs·that·will·contribute·to·future·profits·and·on-going·financial·success.¶
¶
Interest·in·the·fantasy·genre·has·increased·steadily·over·the·past·ten·years,·a·trend·that·shows·no·sign·of·reversal.·Anecdotal·industry·sales·statistics·show·an·increase·of·2·to·3·percent·per·year·for·adult·fantasy·books·and·5·to·6·percent·for·young·adult·fantasy·books.·Each·year·Lucerne·has·published·several·fairytale/magic·books·for·younger·readers,·but·we·do·not·currently·offer·anything·sophisticated·enough·to·appeal·to·young·adult·readers.·Although·we·have·found·it·very·difficult·to·sell·other·genres·to·this·audience·of·reluctant·readers,·there·is·every·indication·that·offering·a·fantasy·series·at·this·time·would·meet·with·success.¶
¶
¶

17. In the selection area, click adjacent to the paragraph mark below the combined paragraph, and then press Del.

CLOSE the *Changes* document without saving your changes.

About the Clipboard

You can view the items that have been cut and copied to the Clipboard by clicking the Clipboard Dialog Box Launcher to open the Clipboard task pane, which displays up to 24 cut or copied items.

To paste an individual item at the insertion point, you simply click the item. To paste all the items, click the Paste All button. You can point to an item, click the arrow that appears, and then click Delete to remove it from the Clipboard, or you can remove all the items by clicking the Clear All button.

You can control the behavior of the Clipboard task pane by clicking Options at the bottom of the pane. You can choose to have the Clipboard task pane appear when you cut or copy one item or multiple items. You can also choose to display the Clipboard icon in the status area of the taskbar when the Clipboard task pane is displayed.

To close the Clipboard task pane, click the Close button at the right end of its title bar.

Inserting Saved Text

To save time and ensure consistency in your documents, you can save any text you use frequently as a ***building block***. You do this by selecting the text, clicking Quick Parts in the Text group on the Insert tab, clicking Save Selection To Quick Part Gallery, and assigning the text a name. It then appears under its assigned name in the Quick Parts gallery.

After you have saved the text, you can insert it at any time by clicking Quick Parts to display its gallery and then clicking the building block you want.

Tip You can also type the name of the building block and then press the F3 key to insert it at the insertion point.

In this exercise, you will save the names of a company and a product as building blocks so that you can insert them elsewhere in a document.

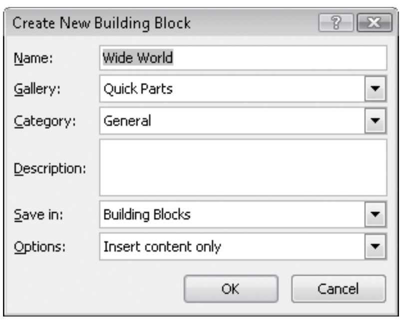
USE the *SavedText* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordEditing* folder.

OPEN the *SavedText* document.

1. Toward the end of the first paragraph of the document, select **Wide World Importers**.

2. On the **Insert** tab, in the **Text** group, click the **Quick Parts** button, and then click **Save Selection to Quick Part Gallery**.

   The Create New Building Block dialog box opens.

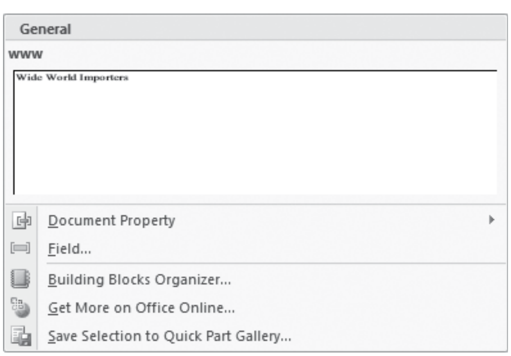


3. In the **Name** box, type **www**, and then click **OK**.

   Word saves the selection in the Quick Parts gallery.

4. In the third paragraph of the document, select **chimonobambusa marmorea**, and then in the **Text** group, click the **Quick Parts** button.

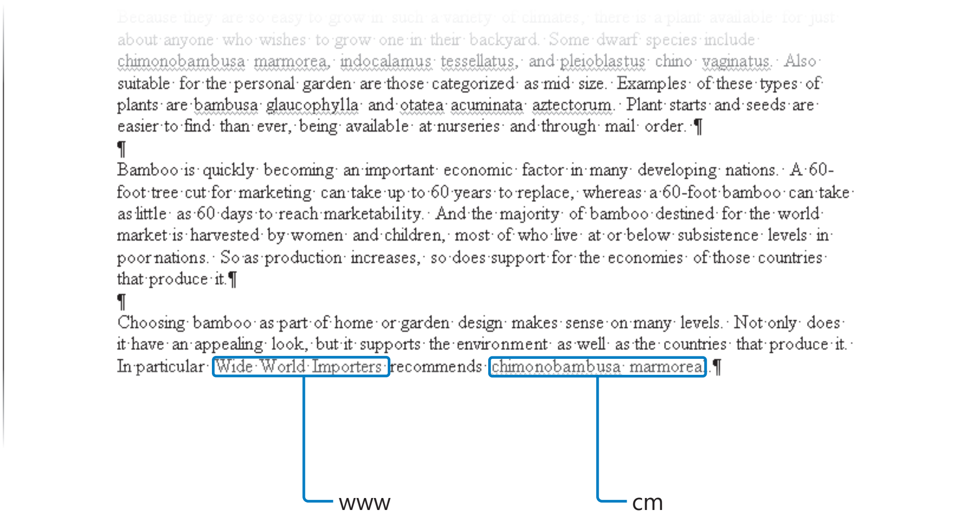
   Notice that the company name now appears as a building block in the Quick Parts gallery.



5. Click **Save Selection to Quick Part Gallery**, and save the selected text with the name cm.
6. Press Ctrl+End to move the insertion point to the end of the document, and then press Space.
7. Type In particular and a space. Then in the **Text** group, click the **Quick Parts** button, and in the gallery, click the **www** entry.

   The company name appears at the insertion point.
8. Type a space followed by recommends cm.
9. Press the F3 key, and then type a period.

   Word replaces *cm* with its building block, *chimonobambusa marmorea*.


Because they are so easy to grow in such a variety of climates, there is a plant available for just about anyone who wishes to grow one in their backyard. Some dwarf species include chimonobambusa marmorea, indocalamus tessellatus, and pleioblastus chino vaginatus. Also suitable for the personal garden are those categorized as mid size. Examples of these types of plants are bambusa glaucophylla and otatea acuminata aztectorum. Plant starts and seeds are easier to find than ever, being available at nurseries and through mail order.¶

¶

Bamboo is quickly becoming an important economic factor in many developing nations. A 60-foot tree cut for marketing can take up to 60 years to replace, whereas a 60-foot bamboo can take as little as 60 days to reach marketability. And the majority of bamboo destined for the world market is harvested by women and children, most of who live at or below subsistence levels in poor nations. So as production increases, so does support for the economies of those countries that produce it.¶

¶

Choosing bamboo as part of home or garden design makes sense on many levels. Not only does it have an appealing look, but it supports the environment as well as the countries that produce it. In particular Wide World Importers recommends chimonobambusa marmorea.¶

> **Troubleshooting** Pressing the F3 key substitutes the corresponding building block only if the name you type contains no spaces. There must be a space to its left, and the insertion point must be to its right.

CLOSE the *SavedText* document without saving your changes.

> **Important** When you exit Word, you will be asked whether you want to save the Building Blocks template, which by default is where your custom building blocks are saved. If you want to discard the building blocks you have created in this Word session, click No. If you want to save them, click Yes.

Inserting the Date and Time

One of the easiest ways to insert today's date or the current time in a document is to use the Insert Date And Time button in the Text group on the Insert tab. After you specify the format you want to use, Word retrieves the date or time from your computer's internal calendar or clock. You can insert the information as regular text or as a ***field***. A field is a placeholder that tells Word to supply the specified information in the specified way. The advantage of using a field is that it can be updated with the click of a button.

Here are the steps for inserting the date or time:

1. With the insertion point located where you want the date or time to appear, on the **Insert** tab, in the **Text** group, click the **Date & Time** button.

   The Date And Time dialog box opens.

2. In the **Available formats** list, click the date and/or time format you want.
3. If you want to insert a date or time field, select the **Update automatically** check box.
4. Click **OK**.

If you selected Update Automatically, Word inserts a Date or Time field depending on the format you selected. When you point to the field, it is highlighted as a unit. You can click the field to select it, and you can click the Update button that appears above it to update the field with the most current information. If you right-click the field, you can click Toggle Field Codes to see the codes that control the field; click the command again to redisplay the date or time information.

You can insert other types of date and time fields, such as a PrintDate field or an EditTime field. Insert a Date or Time field in the usual way, right-click the field, and then click Edit Field. In the Field dialog box, change the setting in the Categories box to Date And Time, and in the Field Names list, click the field you want. When you click OK, the information corresponding to the field type you specified is shown in the document.

Translating Text

Word now comes with built-in dictionaries for many common languages, so you can easily translate words and phrases from one language to another.

To translate a word into another language:

1. Select the word, and then on the **Review** tab, in the **Proofing** group, click the **Translate** button.

   The Research task pane opens with boxes in which you can specify the source language and the translation language.

2. In the **Translation** area in the **Research** task pane, change the settings in the **From** and **To** boxes as necessary.

   The translated text appears below Bilingual Dictionary.

To translate a different word or phrase, you can type it in the Search For box and then click the Start Searching button to the right.

To view the translation of any word you point to, click the Translation ScreenTip button in the Proofing group on the Review tab, and then select the language you want to see. You can then point to any word in a document to display the equivalent word in the language you selected. Click the button again, and then click Turn Off Translation ScreenTip to turn off the translation display.

Finding the Most Appropriate Word

Language is often contextual—you use different words and phrases in a marketing brochure, in a letter requesting immediate payment of an invoice, and in an informal memo about a social gathering after work. To help you ensure that you are using the words that best convey your meaning in any given context, Word provides a ***Thesaurus*** where you can look up synonyms (alternative words) for a selected word. The Thesaurus is one of a set of Research services provided by Word.

To look up alternatives for a word in the Thesaurus, you select the word and then click the Thesaurus button in the Proofing group on the Review tab. The Research task pane opens, displaying a list of synonyms. You then click the synonym that you want to replace the selected word.

In this exercise, you'll use the Thesaurus to replace one word with another.

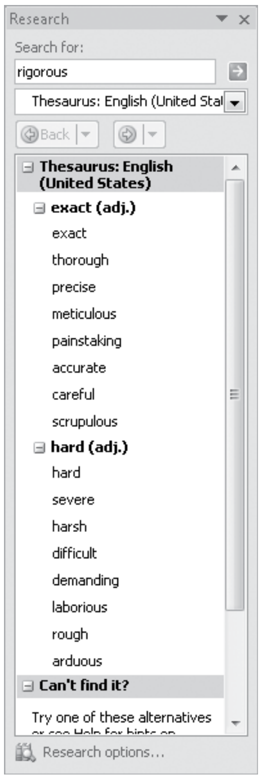
USE the *FindingWord* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordEditing* folder.

OPEN the *FindingWord* document.

1. Double-click the word **rigorous** in the last line of the first paragraph of the letter.

2. On the **Review** tab, in the **Proofing** group, click the **Thesaurus** button.

   The Research task pane opens, listing synonyms for the word *rigorous*.



3. In the task pane, below **exact**, click **meticulous**.

   The word *meticulous* replaces *rigorous* in the Search For box at the top of the task pane, and synonyms for *meticulous* are now listed in the task pane.

4. Point to the word **thorough**, click the arrow that appears, and then click **Insert**.

   The word *thorough* replaces *rigorous* in the document.

5. Close the **Research** task pane.

CLOSE the *FindingWord* document without saving your changes.

Researching Information

In addition to the Thesaurus, the Research task pane provides access to a variety of informational resources from within Word. You can enter a topic in the Search For box and specify in the box below which resource Word should use to look for information about that topic. By clicking Research Options at the bottom of the Research task pane, you can specify which of a predefined list of reference materials, such as Microsoft Encarta and various Internet resources, will be available from a list, and you can add your own reference-material sources.

To research information:

1. On the **Review** tab, in the **Proofing** group, click the **Research** button to display the **Research** task pane.
2. In the **Search for** box, type the topic you are interested in researching.

   For example, you might type *bamboo*.
3. Click the arrow to the right of the box below the Search For box, and then in the list, click the resource you want to use to search for information.

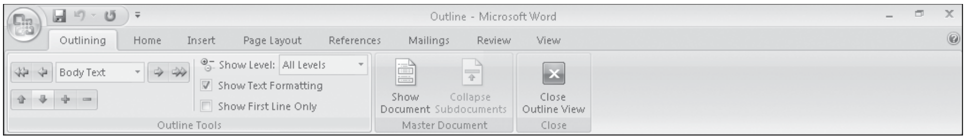
   For example, you might click MSN Search. When you have made your selection, the Start Searching button to the right of the Search For box flashes, and seconds later, the search results are displayed in the task pane.
4. Click any information sources that interest you.

   You can click a hyperlink to a Web address to go to the Web to track down further information. You can also select part of a topic, right-click the selection, click Copy, and then paste the selection into your document. Or you can click right-click the selection and click Look Up to research information about the selection.

Reorganizing a Document Outline

If you are creating a document that contains headings, you can format it with built-in heading styles that include outline levels. Then it is easy to view and organize the document in Outline view. In this view, you can hide all the body text and display only the headings at and above a particular level. You can then rearrange the sections of a document by moving their headings.

To view a document in Outline view, click the Outline button in the Document Views group on the View tab, or click the Outline button on the View toolbar. The document is then displayed with a hierarchical structure, and the Outlining tab appears on the Ribbon.



The Outline Tools group on this tab includes buttons you can click to display only the headings at a specific level and above, to ***promote*** or ***demote*** headings or body text by changing their level, and to move headings and their text up or down in the document. The indentations and symbols used in Outline view to indicate the level of a heading or paragraph in the document's structure do not appear in the document in other views or when you print it.

> **Tip** You can click the buttons in the Master Document group to create a master document with subdocuments that you can then display and hide. The topic of master documents and subdocuments is beyond the scope of this book. For more information, see Word Help.

In this exercise, you'll switch to Outline view, promote and demote headings, move headings, and expand and collapse the outline.

> **USE** the *Outline* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordEditing* folder.
>
> **OPEN** the *Outline* document.

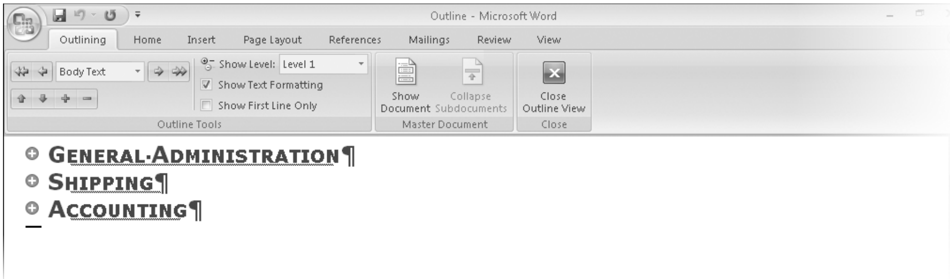

Outline

1. In the lower-right corner of the window, on the **View** toolbar, click the **Outline** button.

   The screen changes to display the document in Outline view, and the Outlining tab appears at the left end of the Ribbon.

2. On the **Outlining** tab, in the **Outline Tools** group, click the **Show Level** arrow, and in the list, click **Level 1**.

The document collapses to display only level-1 headings.



3. Click anywhere in the **Accounting** heading.


Expand

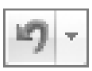
4. In the **Outline Tools** group, click the **Expand** button.

   Word expands the *Accounting* section to display its level-2 headings.


Demote

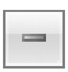
5. In the **Outline Tools** group, click the **Demote** button.

   The *Accounting* heading changes to a level-2 heading.


Undo

6. On the **Quick Access Toolbar**, click the **Undo** button.

   The *Accounting* heading changes back to a level-1 heading.


Collapse

7. In the **Outline Tools** group, click the **Collapse** button.
8. Click the **Demote** button.

   Again, the *Accounting* heading changes to a level-2 heading.
9. Click the **Expand** button.

   Because the subheadings were hidden under *Accounting* when you demoted the heading, all the subheadings have been demoted to level 3 to maintain the hierarchy of the section.


Promote

10. Click the **Collapse** button, and then in the **Outline Tools** group, click the **Promote** button.

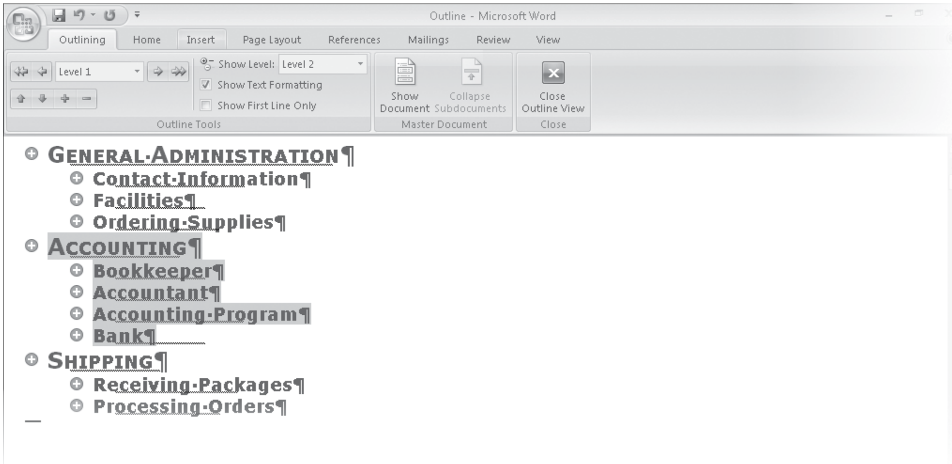
    The *Accounting* heading is now a level-1 heading again.
11. Press Ctrl+Home to move to the top of the document, and then in the **Outline Tools** group, in the **Show Level** list, click **Level 2**.

    The outline shows all the level-1 and level-2 headings.


Move Up

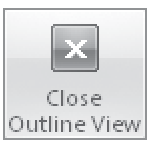
12. Click the plus sign to the left of the *Accounting* heading, and then in the **Outline Tools** group, click the **Move Up** button three times.

The *Accounting* heading and all its subheadings move above the *Shipping* heading.



13. In the **Outline Tools** group, in the **Show Level** list, click **All Levels**.

    You can now scroll through the document to see the effects of the reorganization.



14. In the **Close** group, click the **Close Outline View** button.

    Word displays the reorganized document in Print Layout view.

CLOSE the *Outline* document without saving your changes.

Finding and Replacing Text

One way to ensure that the text in your documents is consistent and accurate is to use the Find feature of Word to search for every instance of a particular word or phrase. For example, if you were responsible for advertising a trademarked product, you would probably want to search your marketing materials to check that every instance of the product's name was correctly identified as a trademark.

Clicking the Find button in the Editing group on the Home tab displays the Find tab of the Find And Replace dialog box. After you enter the text you want to find in the Find What box, you can do the following:

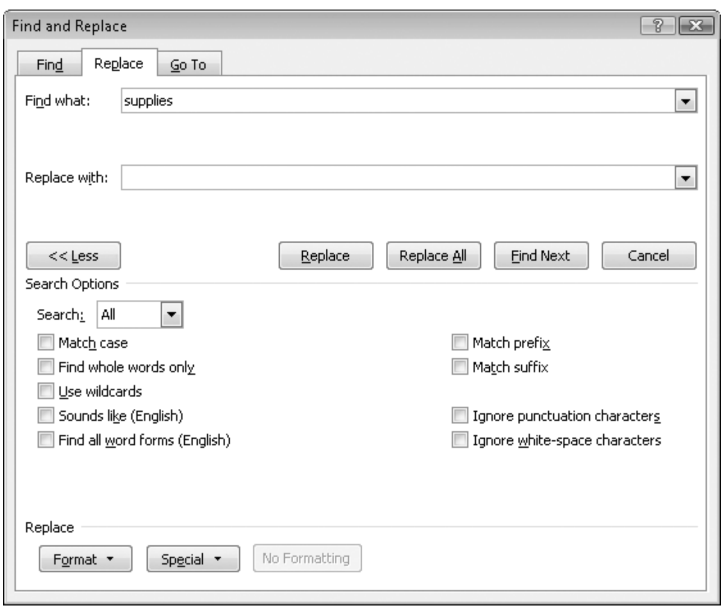
- Click Find Next to select the first occurrence of that text.
- In the Reading Highlight list, click Highlight All to highlight all occurrences.

If you find an error in the document while conducting a search, you can make editing changes on the fly without closing the Find And Replace dialog box. Simply click the document, make the change, and then click the Find And Replace dialog box to make it active again.

If you know that you want to substitute one word or phrase for another, you can use the Replace feature to find each occurrence of the text you want to change and replace it with different text. Clicking the Replace button in the Editing group displays the Replace tab of the Find And Replace dialog box, which is similar to the Find tab. On the Replace tab, you can do the following:

- Click Replace to replace the selected occurrence with the text in the Replace With box and move to the next occurrence.
- Click Replace All to replace all occurrences with the text in the Replace With box.
- Click Find Next to leave the selected occurrence as it is and locate the next one.

You can use other options in the Find And Replace dialog box to carry out more complicated searches and replaces. Clicking More expands the box to make these additional options available.



You can make a selection from the Search list to guide the direction of the search. You can select the Match Case check box to match capitalization and select the Find Whole Words Only check box to find only whole-word occurrences of the Find What text. If you want to check that your usage of two similar words, such as *effect* and *affect*, is correct, you can select the Use Wildcards check box and then enter a ***wildcard character*** in the Find What box to locate variable information. The two most common wildcard characters are:

- The ? wildcard stands for any single character in this location in the Find What text.
- The * wildcard stands for any number of characters in this location in the Find What text.

Tip To see a list of the other available wildcards, use Help to search for wildcards.

Selecting the Sounds Like check box finds occurrences of the search text that sound the same but are spelled differently, such as *there* and *their*. Selecting the Find All Word Forms check box finds occurrences of a particular word in any form, such as *plan*, *planned*, and *planning*. You can match a prefix or a suffix, and you can ignore punctuation and white space. Finally, you can locate formatting, such as bold, or special characters, such as tabs, by selecting them from the Format or Special list.

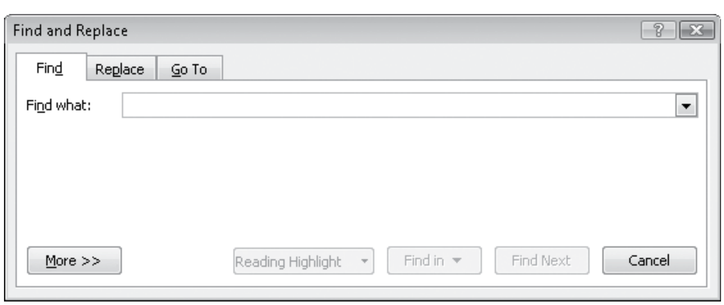
In this exercise, you will find a phrase and make a correction to the document. Then you'll replace one phrase with another throughout the entire document.

USE the *FindingText* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordEditing* folder.

OPEN the *FindingText* document.

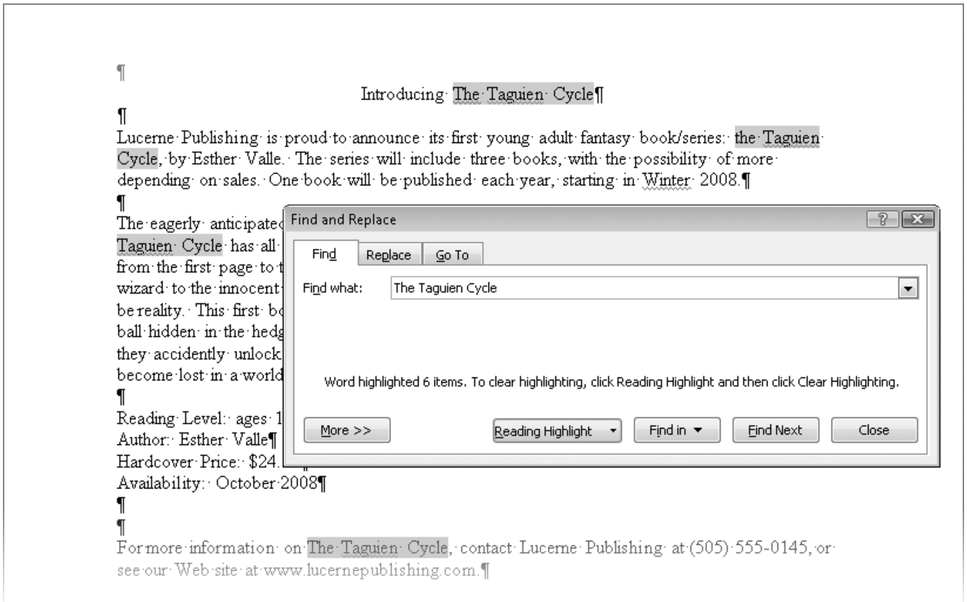
1. With the insertion point at the beginning of the document, on the **Home** tab, in the **Editing** group, click the **Find** button.

   The Find And Replace dialog box opens, displaying the Find tab.



2. In the **Find what** box, type The Taguien Cycle, click **Reading Highlight**, and then in the list, click **Highlight All**.
3. Scroll to page 2.

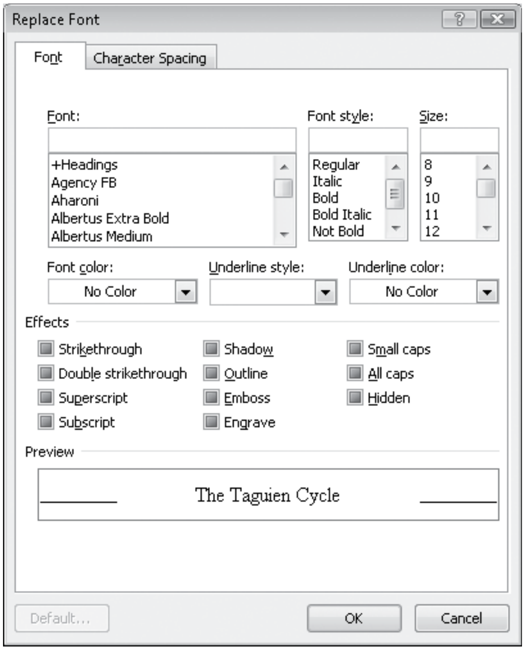
   Word has found and selected all the occurrences of *The Taguien Cycle* in the document. (We dragged the title bar of the dialog box to move it to the side.)



4. Click the document behind the **Find and Replace** dialog box, double-click the word **the** in *the Taguien Cycle* in the first paragraph (not the title) on page 2, and then type The to correct the capitalization.
5. Press Ctrl+Home to move the insertion point to the beginning of the document.
6. Click the title bar of the **Find and Replace** dialog box, and then click the **Replace** tab.

   The Find What box retains the entry from the previous search.
7. Click the **Replace with** box, type The Taguien Cycle, and then click the **More** button.
8. At the bottom of the expanded dialog box, click the **Format** button, and then click **Font**.

The Replace Font dialog box opens.



9. In the **Font Style** list, click **Italic**, and then click **OK**.
10. Click **Find Next**, and then click **Replace**.

    The selected plain text title is replaced with italicized text, and the next occurrence of *The Taguien Cycle* is selected.
11. Click **Replace All**.

    Word displays a message box indicating that six replacements were made.
12. Click **OK** to close the message box, and then in the **Find and Replace** dialog box, click the **Find** tab.
13. In the **Find what** box, click **Reading Highlight**, and then in the list, click **Highlight All**.

    Word highlights six occurrences of the Find What text.
14. Click **Reading Highlight**, and then in the list, click **Clear Highlighting**.

CLOSE the Find And Replace dialog box, and then close the *FindingText* document without saving your changes.

Correcting Spelling and Grammatical Errors

In the days of handwritten and typewritten documents, people might have tolerated a typographical or grammatical error or two because correcting such errors without creating a mess was difficult. Word processors like Word have built-in spelling and grammar checkers, so now documents that contain these types of errors are likely to reflect badly on their creators.

> **Tip** Although Word can help you eliminate misspellings and grammatical errors, its tools are not infallible. You should always read through your documents to catch the problems that the Word tools can't detect.

Word provides two tools to help you with the chore of eliminating spelling and grammar errors: the AutoCorrect and Spelling And Grammar features.

Have you noticed that Word automatically corrects some misspellings as you type them? This is the work of the AutoCorrect feature. AutoCorrect corrects commonly misspelled words, such as *adn* to *and*, so that you don't have to correct them yourself. AutoCorrect comes with a long list of frequently misspelled words and their correct spellings. If you frequently misspell a word that AutoCorrect doesn't change, you can add it to the list in the AutoCorrect dialog box.

If you deliberately mistype a word and don't want to accept the AutoCorrect change, you can reverse it by clicking the Undo button on the Quick Access Toolbar before you type anything else.

Although AutoCorrect ensures that your documents are free of common misspellings, it doesn't detect random typographical and grammatical errors. For those types of errors, you can turn to the Spelling And Grammar feature for help. You might have noticed that as you type, Word underlines potential spelling errors with red wavy underlines and grammatical errors with green wavy underlines. You can right-click an underlined word or phrase to display suggested corrections.

If you want to check the spelling or grammar of the entire document, it is easier to click the Spelling & Grammar button in the Proofing group on the Review tab than to deal with underlined words and phrases individually. Word then works its way through the document from the insertion point and displays the Spelling And Grammar dialog box if it encounters a potential error. If the error is a misspelling, the Spelling And Grammar dialog box suggests corrections; if the error is a breach of grammar, the Spelling And Grammar dialog box tells you which rule you have broken as well as suggesting corrections. The buttons available in the Spelling And Grammar dialog box are dynamic and

change to those most appropriate for fixing the error. For example, for a grammatical error, you are given the opportunity to ignore the rule you have broken throughout the document.

In this exercise, you'll change an AutoCorrect setting and add a misspelled word to its list. You'll check the spelling in the document and add terms to the custom dictionary, and you'll find, review, and correct a grammatical error.

USE the *Spelling* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordEditing* folder.

OPEN the *Spelling* document.

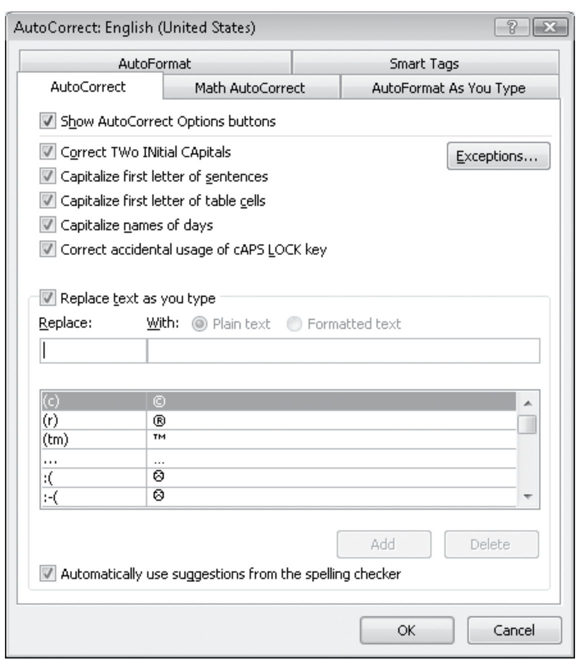
1. Click at the end of the first paragraph in the letter, press Space, and then type **in your reserch**, followed by a period.

   As soon as you type the period, AutoCorrect changes *reserch* to *research*.

Microsoft Office Button

2. Click the **Microsoft Office Button**, and then click **Word Options**.
3. In the left pane of the **Word Options** window, click **Proofing**, and then on the **Proofing** page, click **AutoCorrect Options**.

   The AutoCorrect dialog box opens, displaying the AutoCorrect tab.



Notice the corrections that AutoCorrect will make. You can clear the check box of any item you don't want corrected. For example, if you don't want AutoCorrect to capitalize a lowercase letter or word that follows a period, clear the Capitalize First Letter Of Sentences check box.

4. Click in the **Replace** box, and then type **avalable**.

   Word scrolls the list below to show the entry that is closest to what you typed.

5. Press the Tab key to move the insertion point to the **With** box, and then type **available**.
6. Click **Add** to add the entry to the correction list, and then click **OK**.
7. Click **OK** to close the Word Options window.
8. Press Ctrl+End to move to the end of the document, and then in the paragraph that begins *Thank you for your* interest, position the insertion point to the right of the period at the end of the third sentence.
9. Press Space, and then type **Shelly will not be avalable May 10-15** followed by a period.

   The word *avalable* changes to *available*.

10. Press Ctrl+Home to move to the top of the document, and then right-click *sorces*, the first word with a red wavy underline.

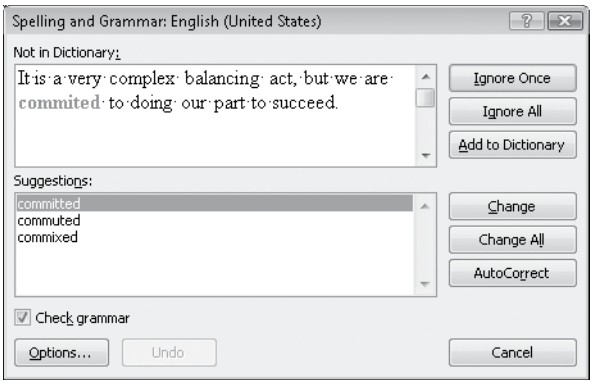
    Word lists possible correct spellings for this word, as well as actions you might want to carry out.

11. In the list, click **sources**.

Word removes the red wavy underline and inserts the correction.

12. Press Ctrl+Home again, and then on the **Review** tab, in the **Proofing** group, click the **Spelling & Grammar** button.

The Spelling And Grammar dialog box opens, with the first word that Word does not recognize, *commited*, displayed in red in the Not In Dictionary box.



13. With **committed** selected in the **Suggestions** box, click **AutoCorrect**.

Word adds the misspelling and the selected correction to the AutoCorrect list, so that the next time you type *commited* by mistake, the spelling will be corrected for you as you type. Word then flags *Dyck* as the next possible misspelling.

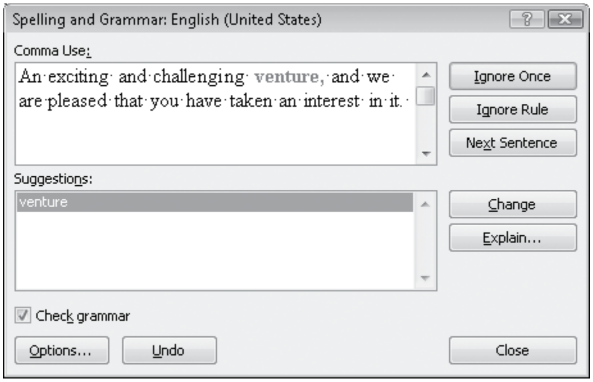
> **Troubleshooting** If the errors we mention don't appear to be in the practice file, click Options at the bottom of the Spelling And Grammar dialog box. Then in the Word Options window, in the When Correcting Spelling And Grammar In Word area, click Recheck Document, click Yes to reset the checkers, and then click OK.

14. Click **Ignore All**.

Word will now skip over this and any other occurrences of this proper noun. It moves on to highlight the duplicate word *for*.

15. Click **Delete**.

Word deletes the second *for* and then flags a possible grammatical error.



This grammatical error is identified as incorrect use of a comma. You need to read the sentence and then decide whether and how to correct it. In this case, the error is not related to the comma after *venture* but to the fact that there is no verb in the first half of the sentence.

> **Tip** Word's grammar checker helps identify phrases and clauses that do not follow traditional grammatical rules, but it is not always accurate. It is easy to get in the habit of ignoring green wavy underlines. However, it is wise to scrutinize them all to be sure that your documents don't contain any embarrassing mistakes.

16. Behind the **Spelling and Grammar** dialog box, click the document, double-click the word **An** at the beginning of the sentence with the error, and then type **The import business is an**.
17. Click the title bar of the **Spelling and Grammar** dialog box, and then click **Resume**.

    Word flags *Florian* as a word that it doesn't recognize. *Florian* is a proper noun and is spelled correctly. By adding words like this one to the custom dictionary, you can prevent Word from continuing to flag them.
18. Click **Add to Dictionary**.

    Word displays a message, indicating that it has finished checking the spelling and grammar of the document.
19. Click **OK** to close the message box.

CLOSE the *Spelling* document without saving your changes.

Viewing Document Statistics

As you type, Word keeps track of the number of pages and words in your document, displaying this information at the left end of the status bar. To see the number of words in only part of the document, such as a few paragraphs, simply select that part. The status bar then displays the number of words in the selection, expressed as a fraction of the total, such as 250/800.

To see more statistics, you can open the Word Count dialog box by clicking the Word Count button in the Proofing group on the Review tab. In addition to the count of pages and words, the Word Count dialog box displays the number of characters, paragraphs, and lines. It also gives you the option of including or excluding words in text boxes, footnotes, and endnotes.

Finalizing a Document

When a document is complete and ready for distribution, you typically perform several final tasks. These might include inspecting the document for any remaining private or inappropriate information, restricting access, or adding a digital signature.

Many documents go through several revisions, and some are scrutinized by multiple reviewers. During this development process, documents can accumulate information that you might not want in the final version, such as the names of people who worked on the document, comments that reviewers have added to the file, or hidden text about status and assumptions. This extraneous information is not a concern if the final version is to be delivered as a printout. However, these days more and more files are delivered electronically, making this information available to anyone who wants to read it.

Word 2007 includes a tool called the Document Inspector, which finds and removes all extraneous and potentially confidential information. You can instruct the Document Inspector to look for comments, revisions, and annotations; for any personal information saved with the document; and for hidden text. The Document Inspector displays a summary of its findings and gives you the option of removing anything it finds.

Word also includes another finalizing tool called the Compatibility Checker, which checks for the use of features not supported in previous versions of Word.

After you handle extraneous information and compatibility issues, you can mark a document as final, which make the file read-only so that other people know that they should not make changes to this released document.

In this exercise, you will inspect a document for inappropriate information and mark it as final.

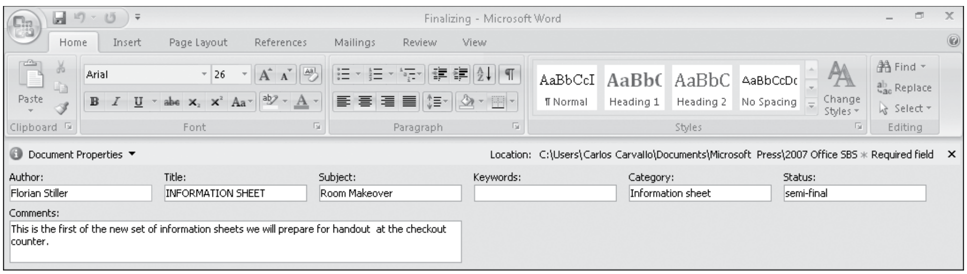
USE the *Finalizing* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordEditing* folder.

OPEN the *Finalizing* document.

Microsoft Office Button

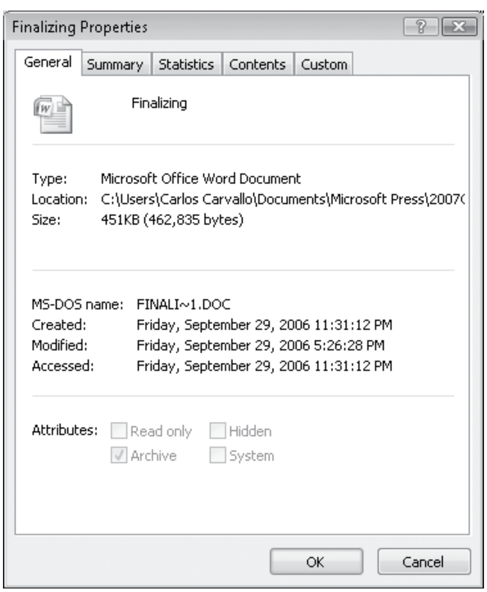
1. Click the **Microsoft Office Button**, point to **Prepare**, and then click **Properties**.

   The Document Information Panel opens above the document, showing the identifying information saved with the file. Some information, including the name of the author, was attached to the file by Word. Other information was added by a user.



2. In the upper-left corner of the **Document Information Panel**, click the **Document Properties** arrow, and then in the list, click **Advanced Properties**.

   The Properties dialog box opens.

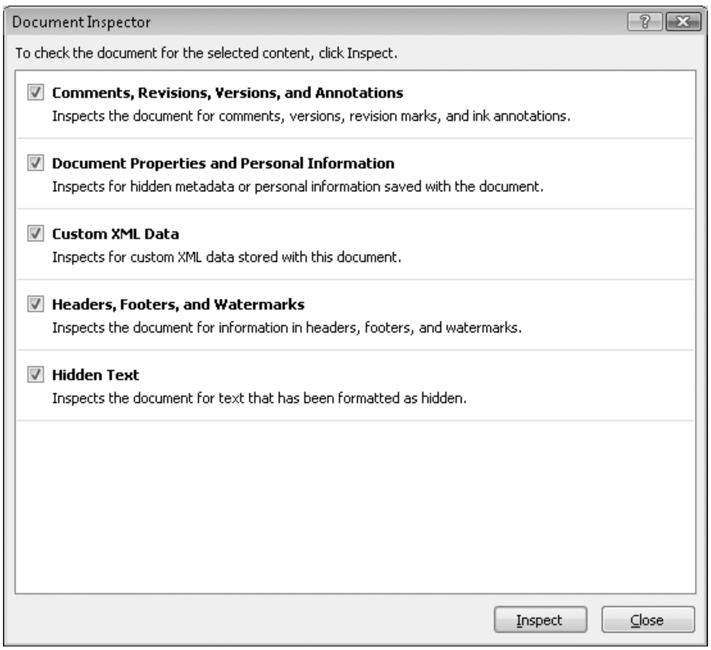


3. In turn, click the **Summary** and **Statistics** tabs, noticing that additional identifying information is displayed there.

Close

4. Click **Cancel** to close the **Properties** dialog box, and then in the upper-right corner of the **Document Information Panel**, click the **Close** button.
5. Save the document in the *WordEditing* folder with the name **My Information Sheet**.
6. Click the **Microsoft Office Button**, point to **Prepare**, and then click **Inspect Document**.

   The Document Inspector dialog box opens, listing the items that will be checked.



7. Without changing the default selections in the **Document Inspector** dialog box, click **Inspect**.

   The Document Inspector reports the presence of the document properties and personal information that you viewed earlier in this exercise, as well as some custom XML data.
8. To the right of **Document Properties and Personal Information**, click **Remove All**.

   Word removes the document properties and personal information.
9. To the right of **Custom XML Data**, click **Remove All**.
10. In the **Document Inspector** dialog box, click **Close**.

11. Click the **Microsoft Office Button**, point to **Prepare**, and then click **Mark As Final**.

    A message tells you that the document will be marked as final and then saved.

12. Click **OK** to complete the process.

    A message tells you that the document has been marked as final and that typing, editing commands, and proofing marks are turned off.

13. Click **OK** to close the message, and then click the **Insert** tab.

    Most of the buttons are inactive, indicating that you cannot make changes to the document.

CLOSE the *My Information Sheet* document, and if you are not continuing directly on to the next chapter, exit Word.

Adding a Digital Signature

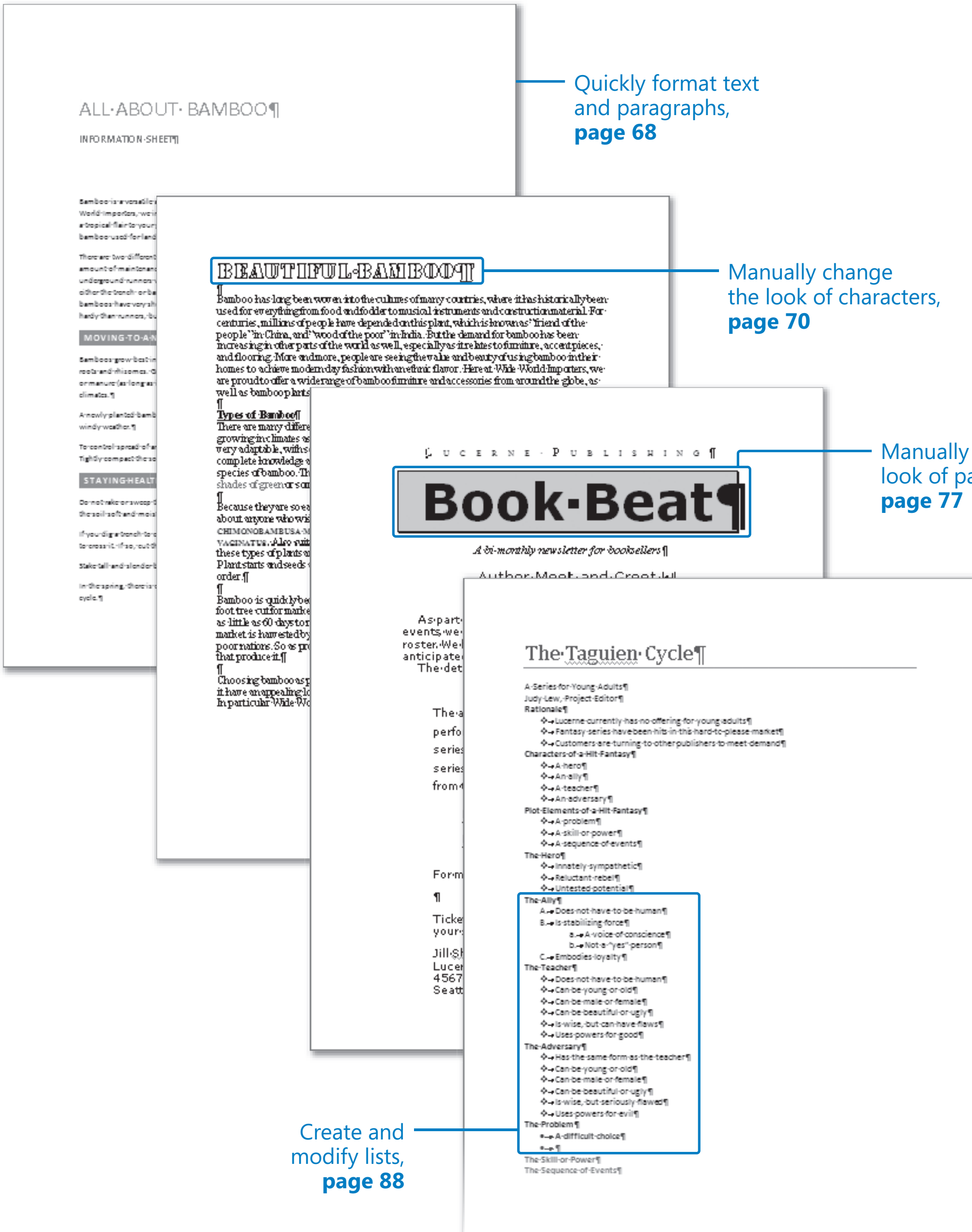
When you create a document that will be circulated to other people via e-mail or the Web, you might want to attach a ***digital signature***, which is an electronic stamp of authentication. The digital signature confirms the origin of the document and indicates that no one has tampered with the document since it was signed.

To add a digital signature to a Word document, you must first obtain a digital ID. Certified digital IDs can be obtained from companies such as IntelliSafe Technologies and Comodo Inc. You can obtain the ID and attach it to a document by clicking the Microsoft Office Button, pointing to Prepare, clicking Add A Digital Signature, and then following the instructions.

Key Points

- You can cut or copy text and paste it elsewhere in the same document or in a different document. Cut and copied text is stored on the Clipboard.
- Made a mistake? No problem! You can undo one action or the last several actions you performed by clicking the Undo button (or its arrow) on the Quick Access Toolbar. You can even redo an action if you change you mind again.
- You don't have to type the same text over and over again. Instead, save the text as a Quick Part and insert it with a few mouse clicks.
- Need a more precise word to get your point across? You can use the Thesaurus to look up synonyms for a selected word, and use the Research service to access specialized reference materials and online resources.
- If you take the time to apply heading styles to a document, you can use the outline to rearrange the document.
- You can find each occurrence of a word or phrase and replace it with another.
- You can rely on AutoCorrect to correct common misspellings. Correct other spelling and grammatical errors individually as you type or by checking the entire document in one pass.
- Before you distribute an electronic document, you can remove any information you don't want people to be able to see.

Chapter at a Glance



Quickly format text and paragraphs, **page 68**

Manually change the look of characters, **page 70**

Manually change the look of paragraphs, **page 77**

Create and modify lists, **page 88**

3 Changing the Look of Text

In this chapter, you will learn to:

- ✔ Quickly format text and paragraphs.
- ✔ Manually change the look of characters.
- ✔ Manually change the look of paragraphs.
- ✔ Create and modify lists.

The appearance of your documents helps to convey their message. Microsoft Office Word 2007 can help you develop professional-looking documents whose appearance is appropriate to their contents. You can easily format your text so that key points stand out and your arguments are easy to grasp.

In this chapter, you will experiment with Quick Styles and then change the look of individual words. Then you'll indent paragraphs, change paragraph alignment and spacing, set tab stops, modify line spacing, and add borders and shading. Finally, you'll create and format both bulleted and numbered lists.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Quickly Formatting Text and Paragraphs

Word 2007 includes a number of new features, as well as enhancements to existing features, that make the process of formatting content effortless. For example, buttons for changing the font size, color, and other character attributes have been gathered in the Font group on the Home tab so that they are all easily accessible. And many common formatting buttons are available on the Mini toolbar that appears when you point to selected text.

See Also For information about changing character attributes, see "Manually Changing the Look of Characters" later in this chapter.

However, you don't have to apply attributes one at a time. You can easily change several attributes at once with a couple of mouse clicks by using ***Quick Styles***. This powerful tool is available in the Styles group on the Home tab. Quick Styles are galleries consisting of the following:

- ***Paragraph styles.*** You can use these styles to apply a consistent look to different types of paragraphs, such as headings, body text, captions, quotations, and list paragraphs.
- ***Character styles.*** You can use these styles to change the appearance of selected words.

All of the Quick Styles in a particular gallery coordinate with each other, lending a clean, consistent, professional look to your documents. You can switch from one set of styles to another by selecting from Quick Styles galleries with names like Traditional, Distinctive, Modern, and Elegant. To help you choose the style you want, you can point to the name of the set to see a live preview of how your document will look with a particular set of Quick Styles applied to it. After you have applied one set of Quick Styles, you can easily change the look of the entire document by selecting a different set of Quick Styles from the Change Styles list.

In this exercise, you will experiment with Quick Styles.

USE the *QuickFormatting* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordFormatting* folder.

BE SURE TO start Word before beginning this exercise.

OPEN the *QuickFormatting* document.

1. With the insertion point at the top of the document, on the **Home** tab, in the **Styles** group, move the pointer over each thumbnail in the displayed row of the **Quick Styles** gallery.

The formatting of the heading changes to show you a live preview of how the heading will look if you click the style you are pointing to. You don't have to actually apply the formatting to see its effect.

Down

2. Without making a selection, click the **Down** arrow to the right of the gallery.

> **Tip** This arrow has a dynamic ScreenTip that currently reads *Row 1 of 5*.

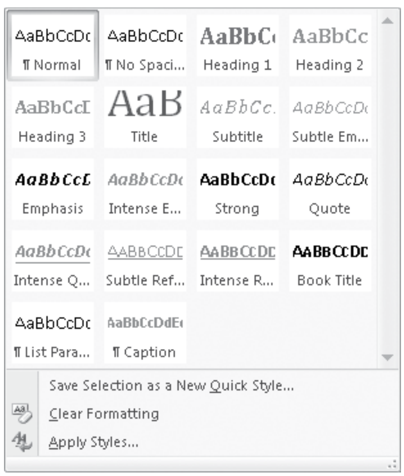
The next row of the Quick Styles gallery scrolls into view.

3. Move the pointer over each thumbnail in this row of the **Quick Styles** gallery.

More

4. In the **Styles** group, click the **More** button.

Word displays the entire Quick Styles gallery. The style applied to the paragraph containing the insertion point is surrounded by a border.



5. In the gallery, click the **Title** thumbnail to apply that style to the paragraph containing the insertion point.
6. Click anywhere in the **Information Sheet** heading, and then in the **Styles** group, click the **Subtitle** thumbnail.

> **Troubleshooting** If you select text and then apply a paragraph style, only the selected text takes on the formatting of the style. You can simply click again in the paragraph and reapply the style.

Up

7. Click anywhere in the **Moving to a New Home** heading, and then in the **Styles** group, click the **Up** arrow, and click the **Heading 1** thumbnail.

8. Apply the **Heading 1** style to the **Staying Healthy** and **Keeping Bugs at Bay** headings.
9. Apply the **Heading 3** style to the **Mites** and **Mealy Bugs** headings.

10. In the **Styles** group, click the **Change Styles** button, click **Style Set**, and then point to each set name in turn, watching the effect on the document.
11. When you have finished exploring, click **Modern**.

    The formatting of the document changes and the headings and text take on the look assigned to this set of styles.

CLOSE the *QuickFormatting* document without saving your changes.

Manually Changing the Look of Characters

When you type text in a document, it is displayed in a particular font. Each ***font*** consists of 256 alphabetic characters, numbers, and symbols that share a common design. By default the font used for text in a new Word document is Calibri, but you can change the font at any time. The available fonts vary from one computer to another, depending on the programs installed. Common fonts include Arial, Verdana, and Times New Roman.

You can vary the look of a font by changing the following ***attributes***:

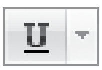
- Almost every font comes in a range of ***font sizes***, which are measured in ***points*** from the top of letters that have parts that stick up (ascenders), such as *h*, to the bottom of letters that have parts that drop down (descenders), such as *p*. A point is approximately 1/72 of an inch.
- Almost every font comes in a range of ***font styles***. The most common are regular (or plain), italic, bold, and bold italic.
- Fonts can be enhanced by applying ***font effects***, such as underlining, small capital letters (small caps), or shadows.
- A palette of harmonious ***font colors*** is available, and you can also specify custom colors.
- You can alter the ***character spacing*** by pushing characters apart or squeezing them together.

After you have selected an appropriate font for a document, you can use these attributes to achieve different effects. Although some attributes might cancel each other out, they are usually cumulative. For example, you might use a bold font in various sizes and various shades of green to make different heading levels stand out in a newsletter. Collectively, the font and its attributes are called ***character formatting***.

In this exercise, you will format the text in a document by changing its font, font style, size, color, and character spacing.

> **USE** the *Characters* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordFormatting* folder.
>
> **OPEN** the *Characters* document.

1. In the *Beautiful Bamboo* heading, click anywhere in the word **Beautiful**.



Underline

2. On the **Home** tab, in the **Font** group, click the **Underline** button.

> **Tip** If you click the Underline arrow, you can choose a style from the Underline gallery. You can also change the underline color.

The word containing the insertion point is now underlined. Notice that you did not have to select the entire word.

Repeat

3. In the same heading, click anywhere in the word **Bamboo**, and then on the **Quick Access Toolbar**, click the **Repeat** button.

The last formatting command is repeated. Again, although you did not select the entire word, it is now underlined.

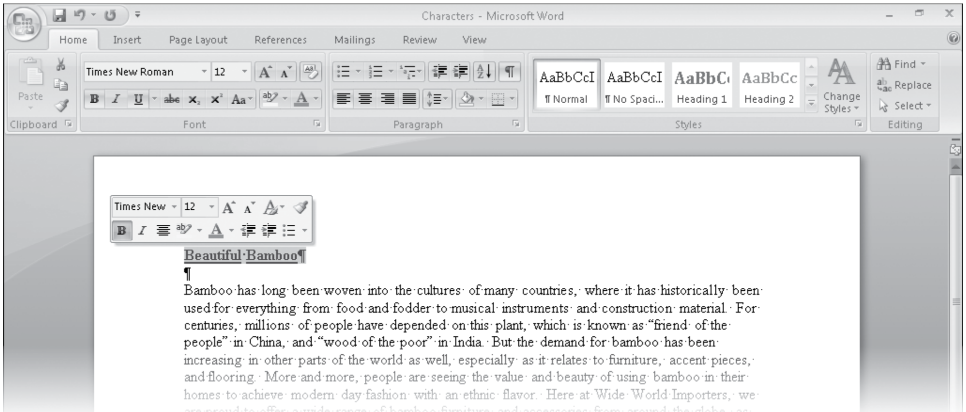
4. In the selection area, click adjacent to *Beautiful Bamboo* to select the entire heading.

Word displays a Mini toolbar of buttons that you can use to quickly change the look of the selection.

Bold

5. On the **Mini toolbar**, click the **Bold** button.

The heading is now bold. The active buttons on the Mini toolbar and in the Font group on the Home tab indicate the attributes that you applied to the selection.



See Also For more information about the use of character formatting, see the sidebar "More About Case and Character Formatting" later in this chapter.


Format Painter

6. On the **Mini toolbar**, click the **Format Painter** button, and then click in the selection area adjacent to the *Types of Bamboo* heading.

   Word "paints" the formatting of *Beautiful Bamboo* onto *Types of Bamboo*.

Tip The Format Painter button is also available in the Clipboard group on the Home tab.

7. Select **Beautiful Bamboo**, and then on the **Home** tab, in the **Font** group, click the **Font** arrow, scroll the list of available fonts, and then click **Stencil**.

Troubleshooting If Stencil is not available, select any heavy font that catches your attention.

   The heading at the top of the document now appears in the new font.

Font Size

8. In the **Font** group, click the **Font Size** arrow, and then in the list, click **26**.

   The size of the heading text increases to 26 points.

Tip You can increase or decrease the font size in set increments by clicking the Grow Font and Shrink Font buttons in the Font group, or by clicking the same buttons on the Mini toolbar that appears when you select text.


Dialog Box Launcher

9. In the **Font** group, click the **Dialog Box Launcher**.

   The Font dialog box opens.

10. Click the **Underline style** arrow, and then in the list, click **(none)**.
11. In the **Effects** area, select the **Outline** check box.
12. Click the **Character Spacing** tab.

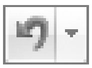
13. Click the **Spacing** arrow, and then in the list, click **Expanded**.
14. To the right, click the **By** up arrow until the spacing is expanded by **2 pt** (points), and then click **OK**.

    The selected text appears with an outline effect and with the spacing between the characters expanded by 2 points.

Clear Formatting

15. On the **Home** tab, in the **Font** group, click the **Clear Formatting** button.

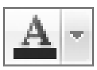
    The formatting of the selected text is removed.


Undo

16. On the **Quick Access Toolbar**, click the **Undo** button.

    The formatting of the selected text is restored.

17. In the last sentence of the second paragraph, select the words **light green**.



Font Color

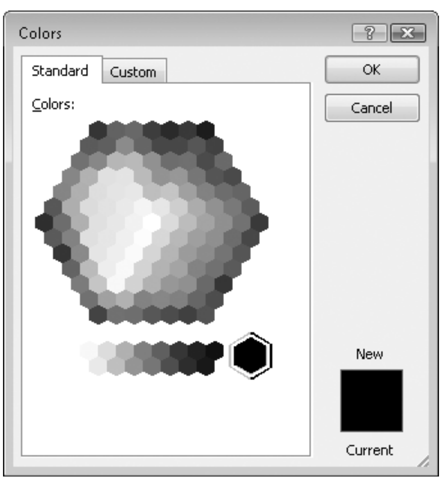
18. On the **Home** tab, in the **Font** group, click the **Font Color** arrow, and then in the **Standard Colors** area of the palette, click the light green box.

    The selected words are now light green. (To see the color, clear the selection by clicking a blank area of the document.)

> **Tip** If you want to apply the Font Color button's current color, you can simply click the button (not the arrow).

19. In the same sentence, select **dark, rich shades of green**, click the **Font Color** arrow, and then below the palette, click **More Colors**.

    The Colors dialog box opens.



20. In the **Colors** wheel on the **Standard** tab, click one of the dark green shades on the left, and then click **OK**.

    The selection is now dark green.

Highlight

21. Select the phrase **supports the environment** in the second sentence of the last paragraph. Then in the **Font** group, click the **Highlight** arrow, and in the **Recent Colors** area of the palette, click the green box.

    This is the same green that you selected in step 20. After you select a custom color in one palette, it is available in all the palettes. The highlighted phrase now stands out from the rest of the text.

> **Tip** If you click the Highlight button without first making a selection, the mouse pointer becomes a highlighter that you can drag across text. Click the Highlight button again or press Esc to turn off the highlighter.

22. In the paragraph that begins *Because they are so easy to grow*, select the bamboo species name **chimonobambusa marmorea**. Then hold down the Ctrl key while selecting **indocalamus tessellatus**, **pleioblastus chino vaginatus**, **bambusa glaucophylla**, and **otatea acuminata aztectorum**.
23. Click the **Font** Dialog Box Launcher.
24. In the **Font** dialog box, click the **Font** tab, and in the **Effects** area, select the **Small caps** check box. Then click **OK**.

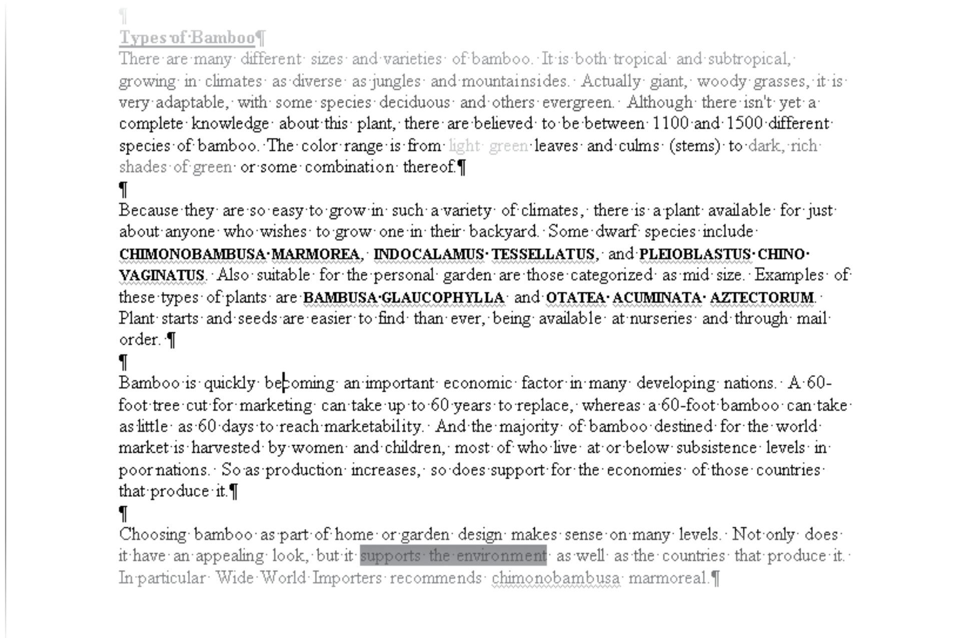
    The lowercase letters in the species names now appear in small capital letters, making those names easy to find in the text.

25. Click anywhere in the first species name. Then on the **Home** tab, in the **Editing** group, click the **Select** button, and click **Select Text with Similar Formatting**.

    All the species names that have been formatted in small caps are selected.

26. In the **Font** group, click the **Bold** button, and then click away from the selection.

    The species names are now both small caps and bold.



Types of Bamboo

There are many different sizes and varieties of bamboo. It is both tropical and subtropical, growing in climates as diverse as jungles and mountainsides. Actually giant, woody grasses, it is very adaptable, with some species deciduous and others evergreen. Although there isn't yet a complete knowledge about this plant, there are believed to be between 1100 and 1500 different species of bamboo. The color range is from light green leaves and culms (stems) to dark, rich shades of green or some combination thereof.

Because they are so easy to grow in such a variety of climates, there is a plant available for just about anyone who wishes to grow one in their backyard. Some dwarf species include **CHIMONOBAMBUSA MARMOREA**, **INDOCALAMUS TESSELLATUS**, and **PLEIOBLASTUS CHINO VAGINATUS**. Also suitable for the personal garden are those categorized as mid size. Examples of these types of plants are **BAMBUSA GLAUCOPHYLLA** and **OTATEA ACUMINATA AZTECTORUM**. Plant starts and seeds are easier to find than ever, being available at nurseries and through mail order.

Bamboo is quickly becoming an important economic factor in many developing nations. A 60-foot tree cut for marketing can take up to 60 years to replace, whereas a 60-foot bamboo can take as little as 60 days to reach marketability. And the majority of bamboo destined for the world market is harvested by women and children, most of who live at or below subsistence levels in poor nations. So as production increases, so does support for the economies of those countries that produce it.

Choosing bamboo as part of home or garden design makes sense on many levels. Not only does it have an appealing look, but it supports the environment as well as the countries that produce it. In particular Wide World Importers recommends chimonobambusa marmoreal.

CLOSE the *Characters* document without saving your changes.

More About Case and Character Formatting

The way you use case and character formatting in a document can influence its visual impact on your readers. Used judiciously, case and character formatting can make a plain document look attractive and professional, but excessive use can make it look amateurish and detract from the message. For example, using too many fonts in the same document is the mark of inexperience, so don't use more than two or three.

Bear in mind that lowercase letters tend to recede, so using all uppercase letters (capitals) can be useful for titles and headings or for certain kinds of emphasis. However, large blocks of uppercase letters are tiring to the eye.

Where do the terms uppercase and lowercase come from? Until the advent of computers, individual characters were assembled to form the words that would appear on a printed page. The characters were stored alphabetically in cases, with the capital letters in the upper case and the small letters in the lower case.

Tip If you want to see a summary of the formatting applied to a selection, you can display the Style Inspector pane by clicking the Styles Dialog Box Launcher and then clicking the Style Inspector button (the middle button at the bottom of the Styles task pane). You can then click anywhere in the document to see a formatting summary of the word containing the insertion point. To see details about the formatting, you can click the Reveal Formatting button at the bottom of the Style Inspector pane to open the Reveal Formatting task pane.

Manually Changing the Look of Paragraphs

As you know, you create a ***paragraph*** by typing text and then pressing the Enter key. The paragraph can be one word, one sentence, or multiple sentences. You can change the look of a paragraph by changing its alignment, its line spacing, and the space before and after it. You can also put borders around it and shade its background. Collectively, the settings you use to vary the look of a paragraph are called ***paragraph formatting***.

In Word, you don't define the width of paragraphs and the length of pages by defining the area occupied by the text; instead you define the size of the white space—the left, right, top, and bottom ***margins***—around the text. You use the Margins button in the Page Setup group on the Page Layout tab to define these margins, either for the whole document or for sections of the document.

See Also For information about setting margins, see "Previewing and Printing a Document" in Chapter 1, "Exploring Word 2007."

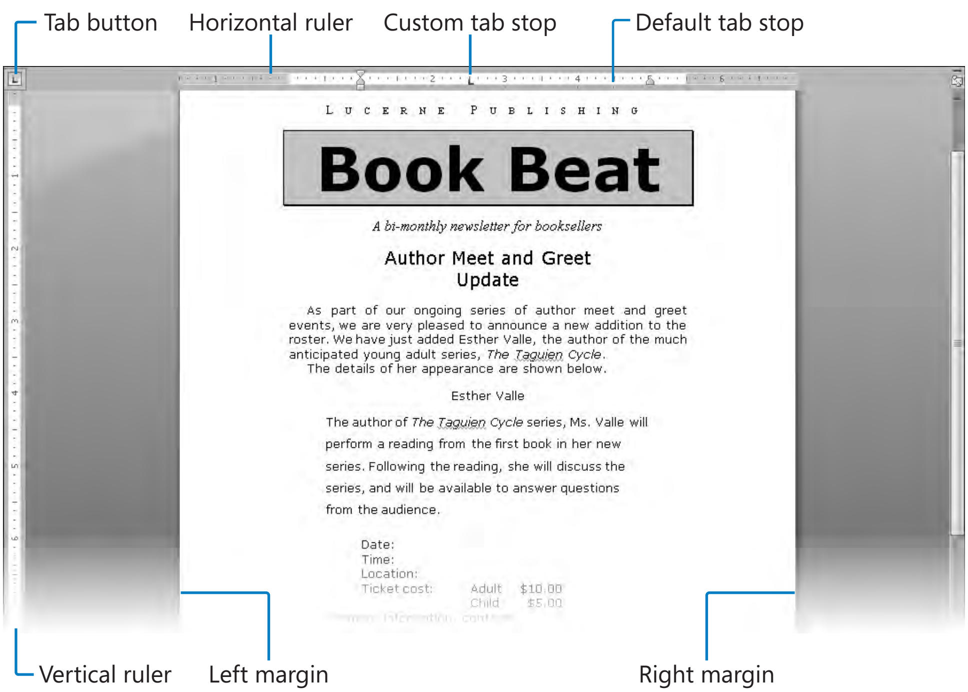
Although the left and right margins are set for a whole document or section, you can vary the position of the text between the margins. The easiest way to do this is by moving controls on the horizontal ruler. You can indent paragraphs from the left and right margins, as well as specify where the first line of a paragraph begins and where the second and subsequent lines begin.

Setting a right indent indicates where all the lines in a paragraph should end, but sometimes you might want to specify where only one line should end. For example, you might want to break a title after a particular word to make it look balanced on the page. You can end an individual line by inserting a ***text wrapping break*** or ***line break***. After positioning the insertion point where you want the break to occur, you click the Breaks button in the Page Setup group on the Page Layout tab, and then click Text Wrapping. Word indicates the line break with a bent arrow. Inserting a line break does not start a new paragraph, so when you apply paragraph formatting to a line of text that ends with a line break, the formatting is applied to the entire paragraph, not just that line.

> **Tip** You can also press Shift+Enter to insert a line break.

You can align lines of text in different locations across the page by using ***tab stops***. The easiest way to set tab stops is to use the horizontal ruler. By default, Word sets left-aligned tab stops every half-inch, as indicated by gray marks below this ruler. To set a custom tab stop, you start by clicking the Tab button located at the left end of the ruler until the type of tab stop you want appears. You have the following options:

- **Left Tab.** Aligns the left end of the text with the stop.
- **Center Tab.** Aligns the center of the text with the stop.
- **Right Tab.** Aligns the right end of the text with the stop.
- **Decimal Tab.** Aligns the decimal point in the text with the stop.
- **Bar Tab.** Draws a vertical bar aligned with the stop down the paragraph containing the insertion point.



After selecting the type of tab stop, you simply click the ruler where you want the tab stop to be. Word then removes any default tab stops to the left of the one you set. To change the position of an existing custom tab stop, you drag it to the left or right on the ruler. To delete a custom tab stop, you drag it away from the ruler.

To move the text to the right of the insertion point to the next tab stop, you press the Tab key. The text is then aligned on the tab stop according to its type. For example, if you set a center tab stop, pressing Tab moves the text so that its center is aligned with the tab stop.

> **Tip** When you want to fine-tune the position of tab stops, click the Paragraph Dialog Box Launcher on either the Home or Page Layout tab. In the Paragraph dialog box, click the Tabs button to display the Tabs dialog box. You might also open this dialog box if you want to use ***tab leaders***—visible marks such as dots or dashes connecting the text before the tab with the text after it. For example, tab leaders are useful in a table of contents to carry the eye from the text to the page number.

In addition to tab stops, the horizontal ruler also displays ***indent markers*** that are used to control where each line of text starts and ends. You use these markers to indent text from the left or right margins as follows:

- **First Line Indent.** Begins a paragraph's first line of text at this marker.
- **Hanging Indent.** Begins a paragraph's second and subsequent lines of text at this marker.
- **Left Indent.** Indents the text to this marker.
- **Right Indent.** Wraps the text when it reaches this marker.

You can also determine the positioning of a paragraph between the left and right margins by changing its alignment. You can click buttons in the Paragraph group on the Home tab to align paragraphs as follows:

- **Align Left.** Aligns each line of the paragraph at the left margin, with a ragged right edge.
- **Align Right.** Aligns each line of the paragraph at the right margin, with a ragged left edge.
- **Center.** Aligns the center of each line in the paragraph between the left and right margins, with ragged left and right edges.
- **Justify.** Aligns each line between the margins, creating even left and right edges.

> **Tip** If you know that you want to type a centered paragraph, you don't have to type it and then format it as centered. You can use the ***Click and Type*** feature to create appropriately aligned text. Move the pointer to the center of a blank area of the page, and when the pointer's shape changes to an I-beam with centered text attached, double-click to create an insertion point that is ready to enter centered text. Similarly, you can double-click at the left edge of the page to enter left-aligned text and at the right edge to enter right-aligned text.

To make it obvious where one paragraph ends and another begins, you can add space between them by adjusting the Spacing After and Spacing Before settings in the Paragraph group on the Page Layout tab. You can adjust the spacing between the lines in a paragraph by clicking the Line Spacing button in the Paragraph group on the Home tab.

When you want to make several adjustments to the alignment, indentation, and spacing of selected paragraphs, it is sometimes quicker to use the Paragraph dialog box than to click buttons and drag markers. Click the Paragraph Dialog Box Launcher on either the Home or Page Layout tab to open the Paragraph dialog box.

To make a paragraph really stand out, you can put a border around it or shade its background. For real drama, you can do both.

Tip A paragraph's formatting is stored in its paragraph mark. If you delete the paragraph mark, thereby making it part of the following paragraph, its text takes on the formatting of that paragraph. If you position the insertion point anywhere in the paragraph and press Enter to create a new one, the new paragraph takes on the existing paragraph's formatting.

In this exercise, you'll change text alignment and indentation, insert and modify tab stops, modify paragraph and line spacing, and add borders and shading around paragraphs to change their appearance.

USE the *Paragraphs* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordFormatting* folder.

BE SURE TO turn on the display of non-printing characters for this exercise. Also display the rulers.

OPEN the *Paragraphs* document.


Zoom Out

1. In the lower-right corner of the document window, click the **Zoom Out** button twice to set the zoom percentage to 80%.

   You can now see all the text of the document.

2. In the fourth line of the document, click to the left of *Update*, and then on the **Page Layout** tab, in the **Page Setup** group, click the **Breaks** button, and then click **Text Wrapping**.

Word inserts a line break character and moves the part of the paragraph that follows that character to the next line.

See Also For information about column breaks, see "Presenting Information in Columns" in Chapter 4, "Presenting Information in Columns and Tables."

Center

3. Select the first four lines of the document, and then on the **Home** tab, in the **Paragraph** group, click the **Center** button.

   The lines are now centered between the margins. Notice that even though you did not select the fifth line, it is also centered because it is part of the *Author Meet and Greet* paragraph.

Justify

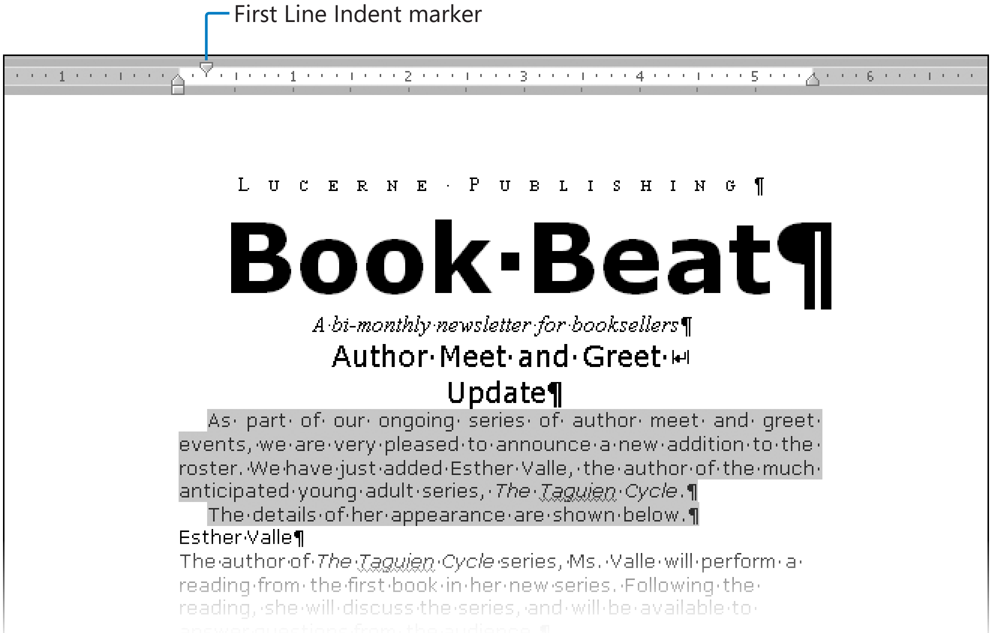
4. Select the next two paragraphs, and then in the **Paragraph** group, click the **Justify** button.

   The edges of the first paragraph are now flush against both the left and right margins. The second paragraph doesn't change because it is less than a line long.

First Line Indent

5. With both paragraphs still selected, on the horizontal ruler, drag the **First Line Indent** marker to the 0.25-inch mark.

The first line of each paragraph is now indented a quarter inch from the left margin.



6. Click anywhere in the *Esther Valle* paragraph, and then in the **Paragraph** group, click the **Center** button.

> **Tip** When applying paragraph formatting, you don't have to select the entire paragraph.

Left Indent

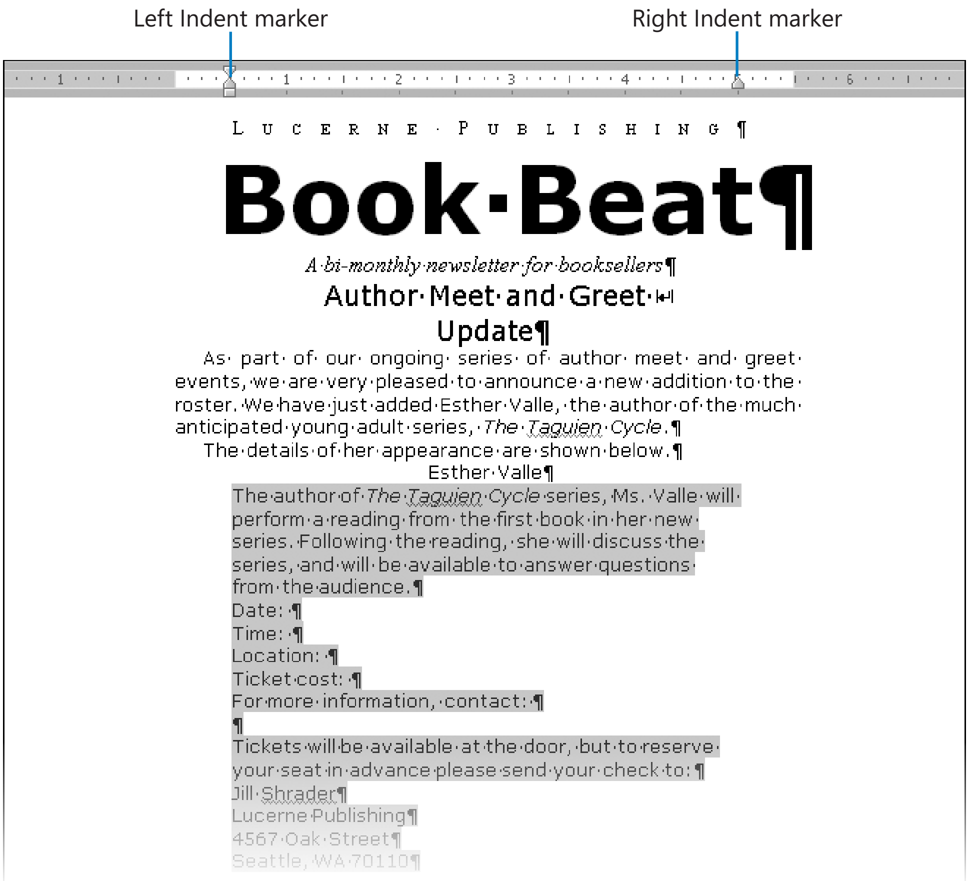
7. Select all the paragraphs below *Esther Valle*, and then on the horizontal ruler, drag the **Left Indent** marker to the 0.5-inch mark.

   The First Line Indent and Hanging Indent markers move with the Left Indent marker, and all the selected paragraphs are now indented a half inch from the left margin.

Right Indent

8. Drag the **Right Indent** marker to the 5-inch mark.

   The paragraphs are now indented from the right margin as well.



LUCERNE PUBLISHING

Book Beat

A bi-monthly newsletter for booksellers

Author Meet and Greet
Update

As part of our ongoing series of author meet and greet events, we are very pleased to announce a new addition to the roster. We have just added Esther Valle, the author of the much anticipated young adult series, *The Taguien Cycle*.

The details of her appearance are shown below.

Esther Valle

The author of *The Taguien Cycle* series, Ms. Valle will perform a reading from the first book in her new series. Following the reading, she will discuss the series, and will be available to answer questions from the audience.

Date:
Time:
Location:
Ticket cost:
For more information, contact:

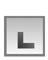
Tickets will be available at the door, but to reserve your seat in advance please send your check to:
Jill Shrader
Lucerne Publishing
4567 Oak Street
Seattle, WA 70110

Tip Left and right margin indents are frequently used to draw attention to special paragraphs, such as quotations.


Increase Indent

9. Select the **Date:**, **Time:**, **Location:**, and **Ticket cost:** paragraphs, and then in the **Paragraph** group, click the **Increase Indent** button.

   These four paragraphs are now indented to the 1-inch mark.


Left Tab

10. Without changing the selection, make sure the **Left Tab** button at the junction of the horizontal and vertical rulers is active, and then click the ruler at the 2.5-inch mark to set a left tab stop.

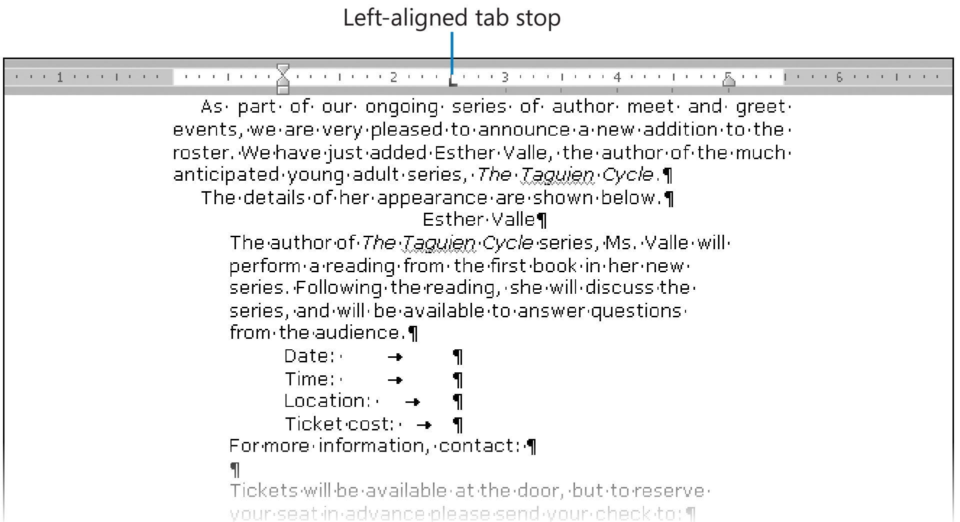
11. Click at the right end of the *Date:* paragraph to position the insertion point before the paragraph mark, and then press the Tab key.

    Word will left-align any text you type after the tab character at the new tab stop.

12. Press the ↓ key, and then press Tab.

13. Repeat step 12 for the *Location* and *Ticket cost* paragraphs.

    All four paragraphs now have tabs that are aligned with the tab stop at the 2.5-inch mark.



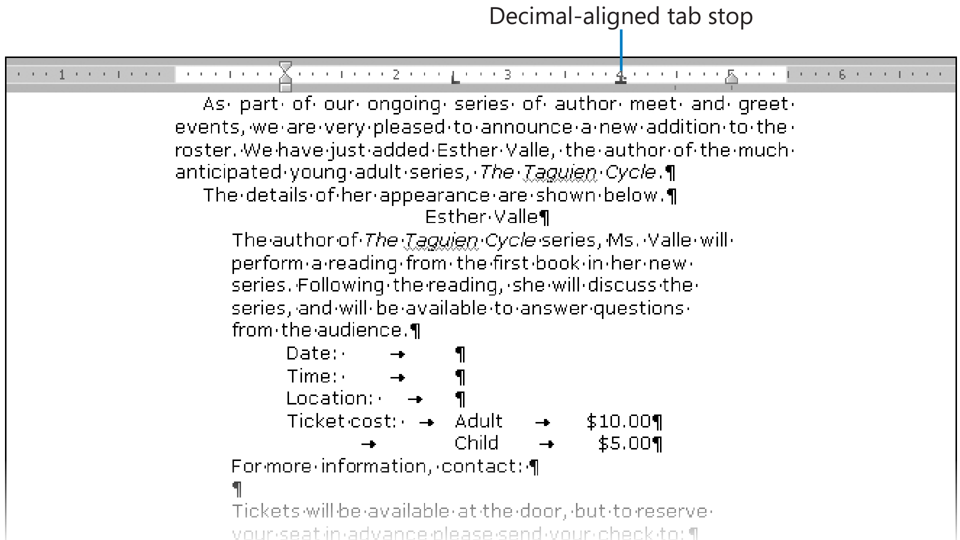
14. Without moving the insertion point, type **Adult**, and then press Tab.


Decimal Tab

15. Click the **Tab** button three times to activate a decimal tab, and then click the 4-inch mark on the horizontal ruler.

16. Type **$10.00**, press Enter, press Tab type **Child**, press Tab again, and then type **$5.00**.

    The new paragraph takes on the same paragraph formatting as the *Ticket cost* paragraph, and the dollar amounts are aligned on their decimal points.

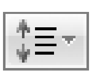


17. Drag through any part of the two paragraphs with dollar amounts, and then on the horizontal ruler, drag the decimal tab stop from the 4-inch mark to the 3.5-inch mark.

18. On the **Home** tab, in the **Editing** group, click the **Select** button, and then click **Select All**.

19. On the **Page Layout** tab, in the **Paragraph** group, change the **Spacing After** setting to **12 pt**.

    Word inserts 12 points of space after every paragraph in the document.


Line Spacing

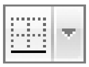
20. Click anywhere in the paragraph that begins *As part of*, and then on the **Home** tab, in the **Paragraph** group, click the **Line Spacing** button, and then click **Remove Space After Paragraph**.

21. Select the **Date:**, **Time:**, **Location:**, and **Ticket cost:** paragraphs, and then repeat step 20.

22. Select the **Jill Shrader**, **Lucerne Publishing**, and **4567 Oak Street** paragraphs, and then repeat step 20 again.

23. Click anywhere in the paragraph that begins *The author of*, click the **Line Spacing** button again, and then click **1.5**.

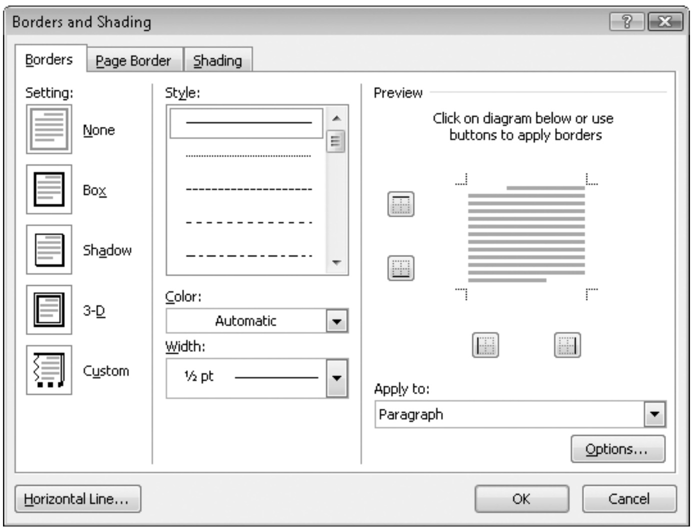
    You have adjusted both the paragraph and line spacing of the document.



Borders

24. Click the *Book Beat* paragraph. Then on the **Home** tab, in the **Paragraph** group, click the **Borders** arrow, and at the bottom of the list, click **Borders and Shading**.

    The Borders And Shading dialog box opens.

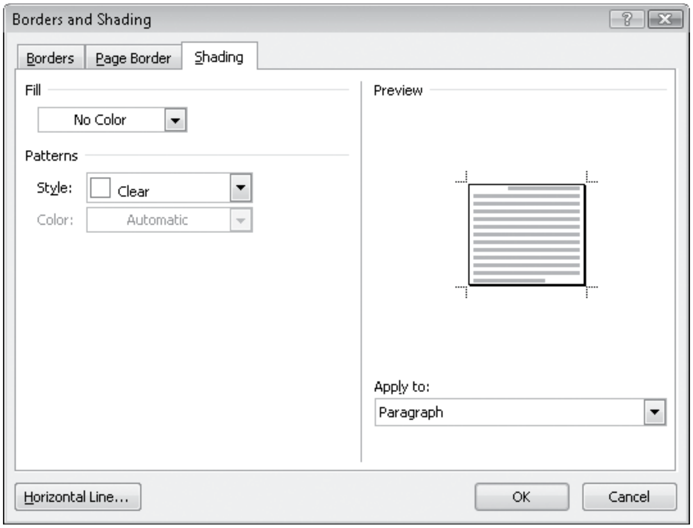


25. In the **Setting** area, click the **Shadow** icon to select that border style.

> **Tip** You can change the settings in the Style, Color, and Width boxes to create the kind of border you want. If you want only one, two, or three sides of the selected paragraphs to have a border, click the buttons surrounding the image in the Preview area.

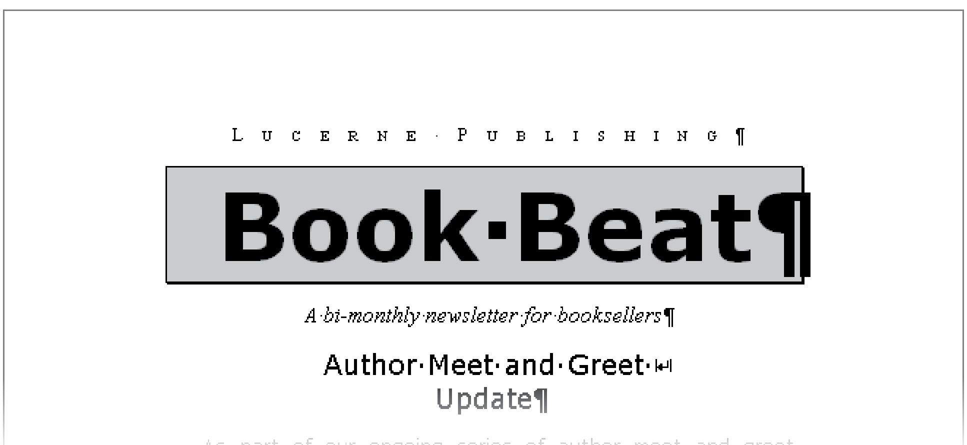
26. Click the **Shading** tab.

    You can use the options on this tab to format the background of the selected paragraph.



27. Click the **Fill** arrow, and in the **Theme Colors** area, click the second lightest purple box (**Purple, Accent 4, Lighter 60%**). Then click **OK** to close the **Borders and Shading** dialog box.

A border with a shadow surrounds the text, and the background color is light purple.



BE SURE TO change the Zoom percentage back to 100% before moving on to the next exercise, and if you want, turn off the rulers.

CLOSE the *Paragraphs* document without saving your changes.

Finding and Replacing Formatting

In addition to searching for words and phrases, you can use the Find And Replace dialog box to search for a specific format and replace it with a different format.

To search for a specific format and replace it with a different format:

1. On the **Home** tab, in the **Editing** group, click the **Replace** button.

   The Find And Replace dialog box opens, displaying the Replace tab.

2. Click **More** to expand the dialog box, click **Format**, and then click **Font** or **Paragraph**.

   The Find Font or Find Paragraph dialog box opens. (You can also click Style to search for paragraph styles or character styles.)

3. In the dialog box, click the format you want to find, and then click **OK**.
4. Click the **Replace with** text box, click **Format**, click **Font** or **Paragraph**, click the format you want to substitute for the Find What format, and then click **OK**.
5. Click **Find Next** to search for the first occurrence of the format, and then click **Replace** to replace that one instance or **Replace All** to replace every instance.

Creating and Modifying Lists

When you want to present a list of items in a document, you will usually want to put each item on its own line rather than burying the items in a paragraph. When the order of items is not important—for example, for a list of items needed to carry out a task—use a bulleted list. When the order is important—for example, for the steps in a procedure—use a numbered list.

With Word, you start a bulleted or numbered list as follows:

- To create a bulleted list, type * (an asterisk) at the beginning of a paragraph, and then press the Spacebar or the Tab key.
- To create a numbered list, type 1. (the numeral 1 followed by a period) at the beginning of a paragraph, and then press the Spacebar or the Tab key.

In either case, you then type the first item in the list and press Enter. Word starts the new paragraph with a bullet or 2 followed by a period and formats the first and second paragraphs as a numbered list. Typing items and pressing Enter adds subsequent bulleted or numbered items. To end the list, press Enter twice, or press Enter and then Backspace.

> **Troubleshooting** If you want to start a paragraph with an asterisk or number but don't want the paragraph to be formatted as a bulleted or numbered list, click the AutoCorrect Options button that appears after Word changes the formatting, and then click Undo.

After you create a list, you can modify, format, and customize the list as follows:

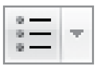
- You can move items around in a list, insert new items, or delete unwanted items. If the list is numbered, Word automatically updates the numbers.
- You can sort items in a bulleted list into ascending or descending order by clicking the Sort button in the Paragraph group on the Home tab.
- For a bulleted list, you can change the bullet symbol by clicking the Bullets arrow in the Paragraph group and making a selection from the Bullet Library. You can also define a custom bullet by clicking the Bullets arrow and then clicking Define New Bullet.
- For a numbered list, you can change the number style by clicking the Numbering arrow in the Paragraph group and making a selection from the Numbering Library. You can also define a custom style by clicking the Numbering arrow and then clicking Define New Number Format.
- You can create a multilevel bulleted list, numbered list, or outline by clicking the Multilevel List button in the Paragraph group, selecting a style from the List Library, and then typing the list. You press Enter to create a new item at the same level, the Tab key to move down a level, and the Backspace key to move up a level.

  See Also For information about another way to create an outline, see "Reorganizing a Document Outline" in Chapter 2, "Editing and Proofreading Documents."
- You can modify the indentation of the list by dragging the indent markers on the horizontal ruler. Lists are set up with the first line "outdented" to the left from the other lines, and you can change both the overall indentation of the list and the relationship of the first line to the other lines.

In this exercise, you will create a bulleted list and a numbered list and then modify lists in various ways. You will then create a multilevel list with letters instead of numbers.

USE the *Lists* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordFormatting* folder.

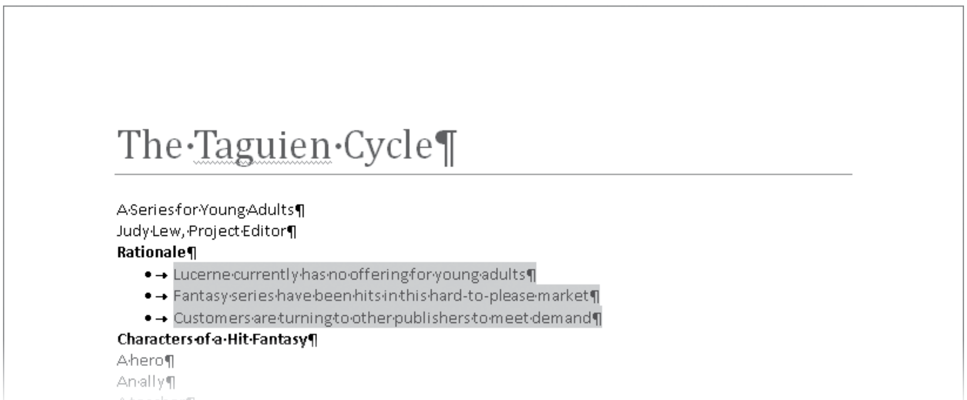
OPEN the *Lists* document.



Bullets

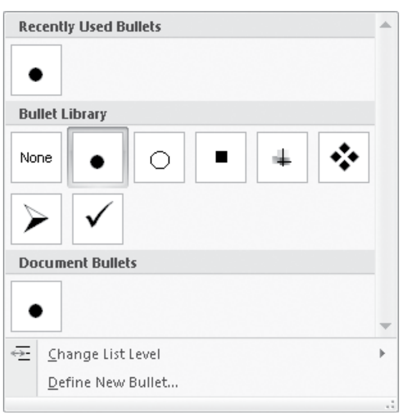
1. Select the three paragraphs below *Rationale*, and then on the **Home** tab, in the **Paragraph** group, click the **Bullets** button.

   The selected paragraphs are reformatted as a bulleted list.



2. With the three paragraphs still selected, in the **Paragraph** group, click the **Bullets** arrow.

   The Bullet Library appears.



3. In the gallery, click the bullet composed of four diamonds.

   The bullet character in the selected list changes.

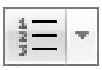
4. Select the four paragraphs below *Characters of a Hit Fantasy*, and then in the **Paragraph** group, click the **Bullets** button.

   The new list has the bullet character you selected for the previous list. This character will be the default until you change it.

5. Select the paragraphs below each of the bold headings, and then in the **Paragraph** group, click the **Bullets** button.

6. Scroll to the bottom of the page, select the four paragraphs below *The Sequence of Events*, and then in the **Paragraph** group, in the **Bullets Library**, click **None**.

   The bulleted paragraphs revert to normal paragraphs.



Numbering

7. With the paragraphs still selected, on the **Home** tab, in the **Paragraph** group, click the **Numbering** button.

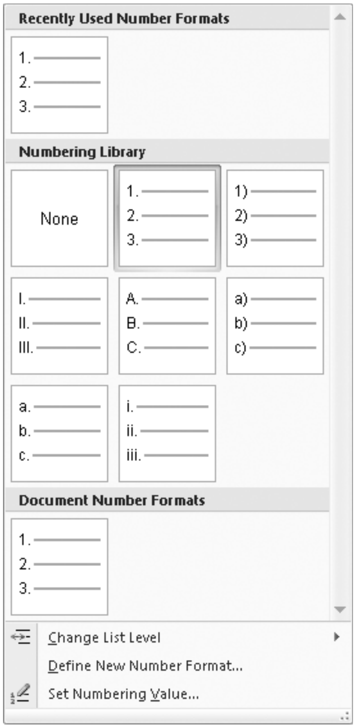
   The selected paragraphs are reformatted as a numbered list.

Can be young or old
Can be male or female
Can be beautiful or ugly
Is wise, but can have flaws
Uses powers for good
The Adversary
Has the same form as the teacher
Can be young or old
Can be male or female
Can be beautiful or ugly
Is wise, but seriously flawed
Uses powers for evil
The Problem

The Skill or Power
The Sequence of Events
1. The Journey
2. The Battle
3. The Twist
4. The Climax

8. In the **Paragraph** group, click the **Numbering** arrow.

   The Numbering Library appears.



9. In the gallery, click the **A. B. C.** box.

   The numbers change to capital letters.


Decrease Indent

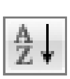
10. With the numbered paragraphs still selected, in the **Paragraph** group, click the **Decrease Indent** button.

    The numbered list moves to the left margin.


Increase Indent

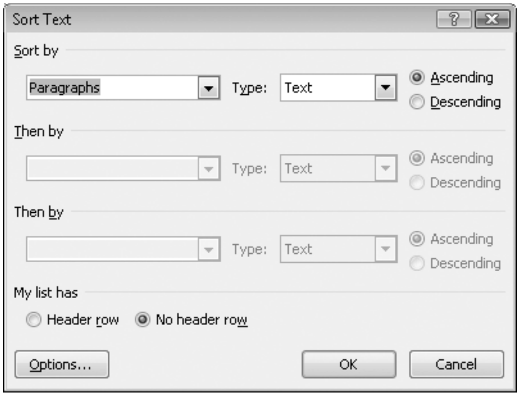
11. In the **Paragraph** group, click the **Increase Indent** button to move the list back to its original indent.

> **Tip** You can also adjust the indent level of a bulleted list by selecting its paragraphs, and on the horizontal ruler, dragging the Left Indent marker to the left or right. The First Line Indent and Hanging Indent markers move with the Left Indent marker. You can move just the Hanging Indent marker to adjust the space between the bullets and their text.


Sort

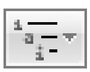
12. Scroll the document until you can see the bulleted list below *The Hero*, select the three bulleted paragraphs, and then on the **Home** tab, in the **Paragraph** group, click the **Sort** button.

    The Sort Text dialog box opens.



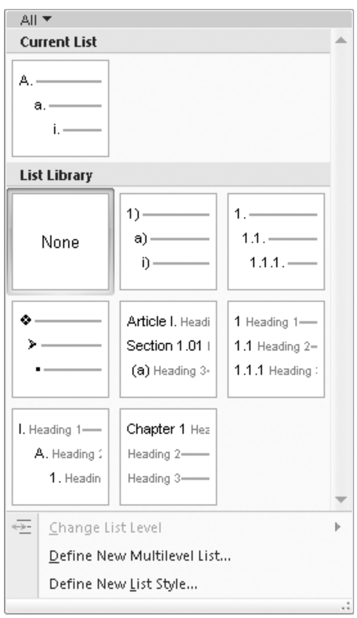
13. With **Ascending** clicked, click **OK**.

    The order of the bulleted items changes to ascending alphabetical order.


Multilevel List

14. Click the blank paragraph below *The Ally*, and then on the **Home** tab, in the **Paragraph** group, click the **Multilevel List** button.

    The List Library appears.



15. In the gallery, click the thumbnail in the **Current List** area.

    The first item in the new numbered list will have a capital letter as its numbering style.

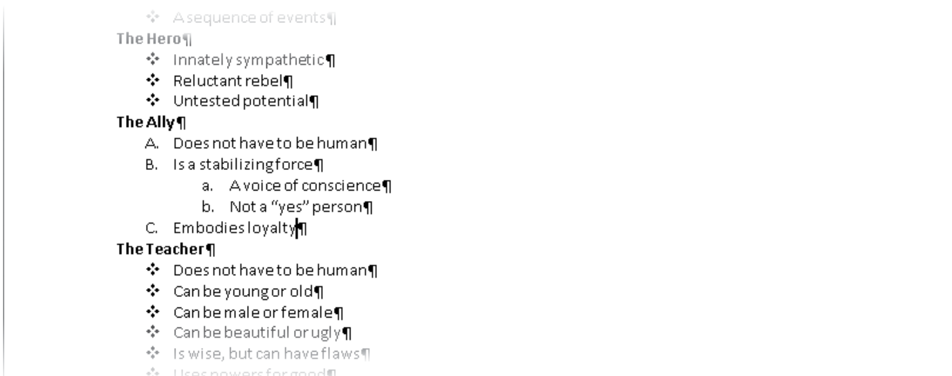
16. Type **Does not have to be human**, press Enter, type **Is a stabilizing force**, press Enter, and then press Tab.

    The new item is indented to the next level and assigned a different number style.

17. Type **A voice of conscience**, press Enter, type **Not a "yes" person**, press Enter, and then press Shift+Tab.

18. Type **Embodies loyalty**.

    Word takes care of all the formatting of the multilevel list.



19. Below *The Problem*, click to the left of the blank paragraph mark, type ***** (an asterisk), press Tab, type **A difficult choice**, and then press Enter.

    Word converts the asterisk into a bullet and formats the next paragraph as a bulleted item.

20. Type **An injustice**, press Enter, and then type **A quest**.

CLOSE the *Lists* document without saving your changes. If you are not proceeding directly to the next chapter, exit Word.

Formatting Text as You Type

The Word list formatting capabilities are just one example of the program's ability to intuit how you want to format an element based on what you type. You can learn more about these and other AutoFormatting options by exploring the AutoCorrect dialog box. To open this dialog box, click the Microsoft Office Button, click Word Options, click Proofing in the left pane of the Word Options window, and then click AutoCorrect Options in the right pane.

On the AutoFormat As You Type tab, you can see the options that Word implements by default, including bulleted and numbered lists. You can select and clear options to control Word's AutoFormatting behavior.

One interesting option is Border Lines. When this check box is selected, you can type three consecutive hyphens (-) and press Enter to have Word draw a single line across the page. Or you can type three consecutive equal signs (=) and press Enter to have Word draw a double line.

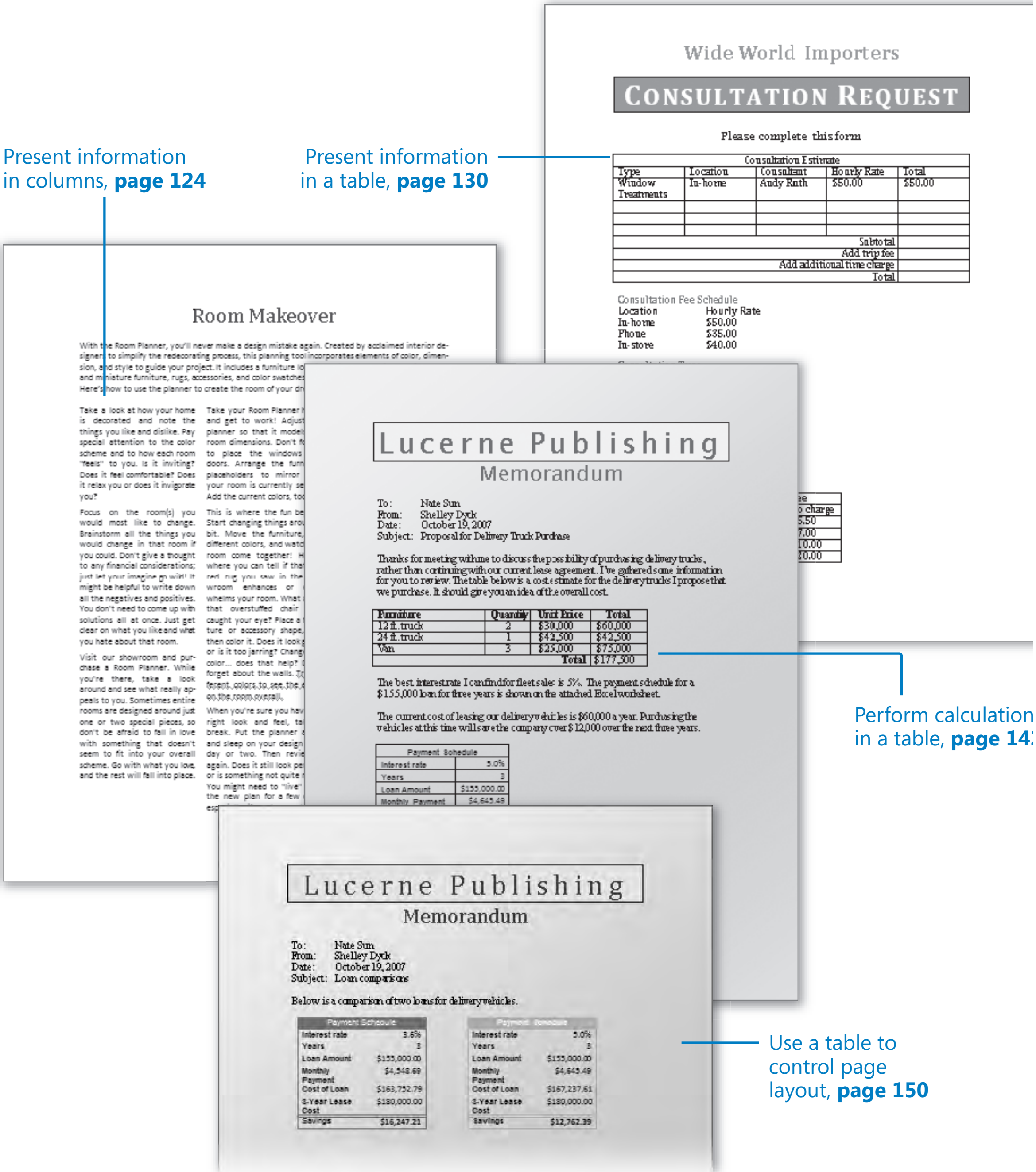
Key Points

- Quick Styles are a great way to apply combinations of formatting to give your documents a professional look.
- You can format characters with an almost limitless number of combinations of font, size, style, and effect—but for best results, resist the temptation to use more than a handful of combinations.
- You can change the look of paragraphs by varying their indentation, spacing, and alignment and by setting tab stops. Use these formatting options judiciously to create documents with a balanced, uncluttered look.
- Bulleted and numbered lists are a great way to present information in an easy to read, easy to understand format. If the built-in bulleted and numbered list styles don't provide what you need, you can define your own styles.

Chapter at a Glance

Present information in columns, **page 124**

Present information in a table, **page 130**



Perform calculation in a table, **page 14**

Use a table to control page layout, **page 150**

4 Presenting Information in Columns and Tables

In this chapter, you will learn to:

- ✔ Present information in columns.
- ✔ Create a tabular list.
- ✔ Present information in a table.
- ✔ Format table information.
- ✔ Perform calculations in a table.
- ✔ Use a table to control page layout.

When creating a Microsoft Office Word 2007 document, you might find it useful to organize certain information into columns or tables. Flowing text in multiple columns is common practice in newsletters, flyers, and brochures. After you specify the number of columns, Word flows the text from one column to the next. You can also manually end one column and move subsequent text to the next column.

It is often more efficient to present numeric data in a table than to explain it in a paragraph of text. Tables make the data easier to read and understand. Small amounts of data can be displayed in simple columns separated by left, right, centered, or decimal tab stops to create a tabular list. Larger amounts or more complex data is better presented in a Word table that includes a structure of rows and columns, frequently with row and column headings.

A Word table is useful not only for presenting data but also for providing the structure for complex document layouts. For example, you can set up a table with two columns and two rows to present a set of four paragraphs, four bulleted lists, or four tables in a format in which they can be easily compared.

In this chapter, you will create and modify columns of text, create a simple tabular list, create tables from scratch and from existing text, format a table in various ways, and perform calculations within a table. You will copy and paste worksheet data, link to worksheet data, and create a Microsoft Office Excel 2007 object. And finally, you will create a table for the purpose of displaying two other tables side by side.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Presenting Information in Columns

By default, Word displays text in one ***column***, but you can specify that text be displayed in two, three, or more columns to create layouts like those used in newspapers and magazines. When you format text to ***flow*** in columns, the text fills the first column and then moves to the top of the next column. You can insert a ***column break*** to move to the next column before the current column is full.

Word provides several standard options for dividing text into columns. You have the choice of one, two, or three equal columns, or two other two-column formats: one with a narrow left column and the other with a narrow right column. No matter how you set up the columns initially, you can change the layout or column widths at any time.

You can format the text in columns the same way you would any text. If you ***justify*** the columns for a neater look, you might want to have Word hyphenate the text to ensure that there are no large gaps between words.

In this exercise, you will divide part of a document into three columns. You will then justify the columns, change the column spacing, hyphenate the text, and indent a couple of paragraphs. You'll also break a column at a specific location instead of allowing the text to flow naturally from one column to the next.

USE the *Columns* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordPresenting* folder.

BE SURE TO display the rulers and non-printing characters before starting this exercise.

OPEN the *Columns* document.

1. Click just to the left of the paragraph that begins *Take a look* (do not click in the selection area). Then scroll the end of the document into view, hold down the Shift key, and click just to the right of the period after *credit cards*.

   Word selects the text from the *Take a look* paragraph through the end of the document.

> **Tip** If you want to format an entire document with the same number of columns, you can simply click anywhere in the document—you don't have to select the text.

2. On the **Page Layout** tab, in the **Page Setup** group, click the **Columns** button, and then click **Three**.
3. Press Ctrl+Home to move to the top of the document.

   Word has inserted a section break above the selection and formatted the text after the section break into three columns.

Room Makeover¶

With the Room Planner, you'll never make a design mistake again. Created by acclaimed interior designers to simplify the redecorating process, this planning tool incorporates elements of color, dimension, and style to guide your project. It includes a furniture location guide; room grid; drawing tools; and miniature furniture, rugs, accessories, and color swatches that match our large in-store selection. Here's how to use the planner to create the room of your dreams!¶

¶ Section Break (Continuous)

Take a look at how your home is decorated and note the things you like and dislike. Pay special attention to the color scheme and to how each room "feels" to you. Is it inviting? Does it feel comfortable? Does it relax you or does it invigorate you?¶

Focus on the room(s) you

love, and the rest will fall into place.¶

Take your Room Planner home and get to work! Adjust the planner so that it models the room dimensions. Don't forget to place the windows and doors. Arrange the furniture placeholders to mirror how your room is currently set

design for a day or two. Then review it again. Does it still look perfect, or is something not quite right? You might need to "live" with the new plan for a few days, especially if you've made big changes. When everything feels just right to you, you're ready for the next big step!¶

4. On the **Home** tab, in the **Editing** group, click the **Select** button, and then click **Select All**.


Justify

5. In the **Paragraph** group, click the **Justify** button.

   The spacing of the text within the paragraphs changes so the right edge of the paragraph is straight.

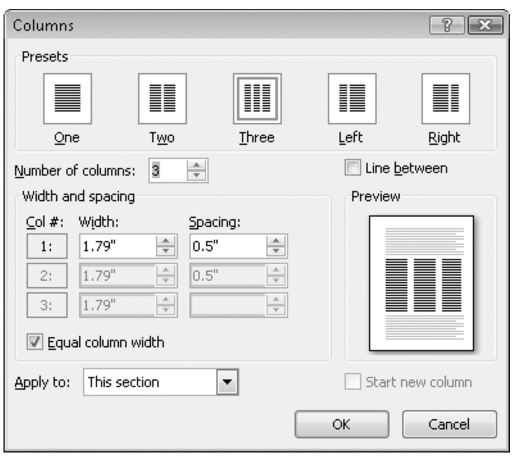

Center

6. Press Ctrl+Home to deselect the text and move to the top of the document, and then in the **Paragraph** group, click the **Center** button to center the title.
7. At the right end of the status bar, click the **Zoom** button. Then in the **Zoom** dialog box, click **75%**, and click **OK**.

   You can now see about two-thirds of the first page of the document.
8. Click anywhere in the first column.

   On the horizontal ruler, Word indicates the margins of the columns.
9. On the **Page Layout** tab, in the **Page Setup** group, click the **Columns** button, and then click **More Columns**.

   The Columns dialog box opens. Because the Equal Column Width check box is selected, you can adjust the width and spacing of only the first column.



10. In the **Width and spacing** area, in the **Spacing** column, click the down arrow until the setting is **0.2"**.

    Word changes the measurement in the box below and widens all the columns to reflect the new setting.
11. Click **OK**.

Word reflows the columns to fit their new margins.


Room Makeover

With the Room Planner, you'll never make a design mistake again. Created by acclaimed interior designers to simplify the redecorating process, this planning tool incorporates elements of color, dimension, and style to guide your project. It includes a furniture location guide; room grid; drawing tools; and miniature furniture, rugs, accessories, and color swatches that match our large in-store selection. Here's how to use the planner to create the room of your dreams!

Section Break (Continuous)

Take a look at how your home is decorated and note the things you like and dislike. Pay special attention to the color scheme and to how each room "feels" to you. Is it inviting? Does it feel comfortable? Does it relax you or does it invigorate you?

Focus on the room(s) you would most like to change. Brainstorm all the things you would change in that room if you could. Don't give a thought to any financial considerations; just let your imagine go wild! It might be helpful to write down all the negatives and positives. You don't need to come up with solutions all at once. Just get

planner so that it models the room dimensions. Don't forget to place the windows and doors. Arrange the furniture placeholders to mirror how your room is currently set up. Add the current colors, too.

This is where the fun begins! Start changing things around a bit. Move the furniture, add different colors, and watch the room come together! Here's where you can tell if that rich red rug you saw in the showroom enhances or overwhelms your room. What about that overstuffed chair that caught your eye? Place a furniture or accessory shape, and then color it. Does it look

just right to you, you're ready for the next big step!

Come back to the store. Look again at the pieces you liked during your last visit and see if you still love them. If you're not quite sure, go back to your planner for a little more tweaking. If you are sure, take a look around the store one more time to see if anything else catches your eye. Then make your purchases. You're almost there!

NOTE: If you decided to paint your room, do that before your new pieces are delivered. You'll want to start enjoying your new room as soon as your purchases

12. Click immediately to the left of *Take a look*. Then in the **Page Setup** group, click the **Hyphenation** button, and click **Automatic**.

Word hyphenates the text of the document, which fills in some of the large gaps between words.

13. Click anywhere in the *NOTE* paragraph in the third column.


Hanging Indent

14. On the horizontal ruler, in the third column, drag the **Hanging Indent** marker 0.25 inch (two marks) to the right.

All the lines in the *NOTE* paragraph except the first are now indented, offsetting the note from the paragraphs above and below it.

15. Click just to the left of *Take your Room Planner home* at the bottom of the first column on page 1. Then in the **Page Setup** group, click the **Breaks** button, and click **Column**.

The text that follows the column break moves to the top of the second column.

Repeat Insertion

16. Click just to the left of *If you're not sure* at the bottom of the third column on page 1, and then on the **Quick Access Toolbar**, click the **Repeat Insertion** button to insert another column break.

The text that follows the column break moves to the top of the first column on page 2.

CLOSE the *Columns* document without saving your changes.

Creating a Tabular List

If you have a relatively small amount of data to present in a table, you might choose to display it in a ***tabular list***, which arranges text in simple columns separated by left, right, centered, or decimal tab stops.

See Also For more information about setting tab stops, see "Manually Changing the Look of Paragraphs" in Chapter 3, "Changing the Look of Text."

When entering text in a tabular list, people have a tendency to press the Tab key multiple times to align the columns of the list. If you do this, you have no control over the column widths. To be able to fine-tune the columns, you need to set custom tab stops rather than relying on the default ones. When you want to set up a tabular list, you should press Tab only once between the items that you want to appear in separate columns. You can then apply any necessary formatting and set the tabs in order from left to right so that you can see how everything lines up.

Tip In addition to left, right, centered, and decimal tabs, you can set a bar tab. This type of tab does not align text like the others, but instead adds a vertical line to selected paragraphs. This bar can be used to further distinguish the columns in a tabular list.

In this exercise, you will create a tabular list. First you'll enter text separated by tabs, and then you'll format the text and set custom tab stops.

USE the *TabularList* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordPresenting* folder.

BE SURE TO display the rulers and non-printing characters before starting this exercise.

OPEN the *TabularList* document.

1. Scroll down to the bottom of the document, click to the left of the paragraph mark at the end of *The Skill or Power*, and then press Enter.

2. Type **Self**, press Tab, type **Other People**, press Tab, type **Nature**, and then press Enter.

3. Add three more lines to the list by typing the following text. Press Tab once between each item in a line, and press Enter at the end of each line except the last.

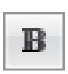
   Transformation Tab ***Life/death*** Tab ***Weather***

   Time travel Tab ***Telepathy*** Tab ***Oceans***

   Visible/invisible Tab ***Mind control*** Tab ***Animals***

   The tab characters push the items to the next default tab stop, but because some items are longer than others, they do not line up.

See Also For information about tab stops, see "Manually Changing the Look of Paragraphs" in Chapter 3, "Changing the Look of Text."


Bold

4. Select the first line of the tabular list, and then on the **Mini toolbar** that appears, click the **Bold** button.

> **Troubleshooting** If the Mini toolbar doesn't appear, click the Bold button in the Font group on the Home tab.


Increase Indent

5. Select all four lines of the tabular list, and then on the **Mini toolbar**, click the **Increase Indent** button.

6. With the lines still selected, on the **Page Layout** tab, in the **Paragraph** group, under **Spacing**, change the **After** setting to **0 pt**.


Left Tab

7. Without changing the selection, verify that the **Tab** button at the junction of the horizontal and vertical rulers shows a Left Tab stop (an L), and then click the 2-inch mark on the horizontal ruler.

   Word displays a Left Tab stop on the ruler, and the items in the second column of all the selected lines left-align themselves at that position.

8. Click the **Tab** button twice.

   The icon on the button changes to a Right Tab stop (a backward L), indicating that clicking the ruler now will set a right-aligned tab.

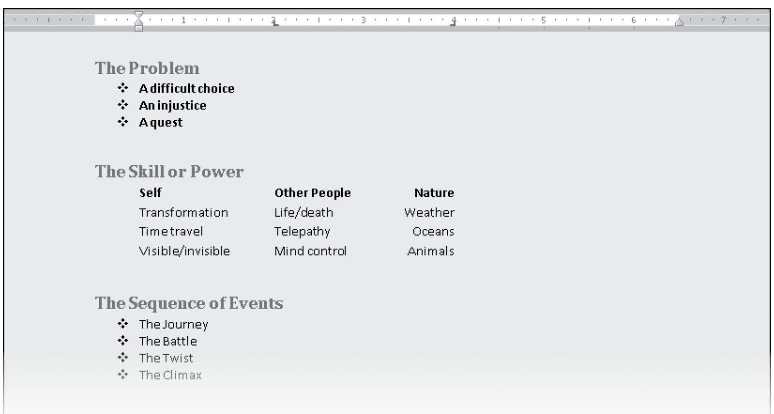
9. Click the horizontal ruler at the 4-inch mark.

   Word displays a Right Tab stop on the ruler, and the items in the third column of the selected lines jump to right-align themselves at that position.


Show/Hide ¶

10. On the **Home** tab, in the **Paragraph** group, click the **Show/Hide ¶** button to hide non-printing characters. Then click away from the tabular list to see the results.

    The tabular list resembles a simple table.



CLOSE the *TabularList* document without saving your changes.

Presenting Information in a Table

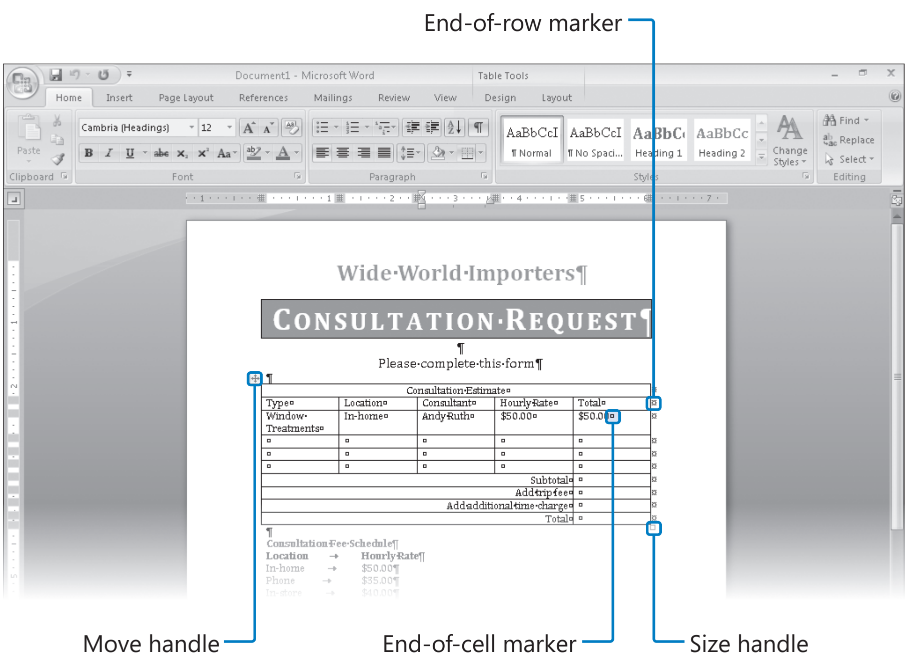
Creating a Word table is a simple matter of clicking the Table button and selecting the number of rows and columns you want from a grid. You can then enter text, numbers, and graphics into the table's ***cells***, which are the boxes at the intersections of a row and

a column. At any time, you can change the table's size; insert and delete columns, rows, and cells; and format individual entries or the entire table. You can sort the information in a logical order and perform calculations on the numbers in a column or row.

Clicking the Table button creates a table with the number of columns and rows you select from the grid, with all the cells of equal size. You can click Insert Table below the grid to open the Insert Table dialog box, where you can specify the number of rows and columns as well as their sizes. You can also create a table by drawing cells the size you want. If the text you want to appear in a table already exists in the document, you can convert the text to a table.

See Also For information about drawing tables, see "Using a Table to Control Page Layout" later in this chapter.

A new table appears in the document as a set of blank cells surrounded by ***gridlines***. Each cell has an end-of-cell marker, and each row has an end-of-row marker. When the pointer is over the table, the table has a move handle in its upper-left corner and a size handle in its lower-right corner. While the insertion point is in the table, Word displays two Table Tools contextual tabs, Design and Layout.



Tip You cannot see the move handle and size handle in Draft view.

After you create a table, you can type text or numbers into cells and press the Tab key to move the insertion point from cell to cell. Pressing Tab when the insertion point is in the last cell in the last row adds a new row to the bottom of the table. In addition to the Tab key, you can use the Arrow keys to position the insertion point, or you can simply click any cell.

You can modify a table's structure at any time. To change the structure, you often need to select the entire table or specific rows or columns, by using the following methods:

- **Select a table.** Click anywhere in the table. Then on the Layout contextual tab, in the Table group, click the Select button, and click Select Table.
- **Select a column.** Point to the top border of the column. When the pointer changes to a black, down-pointing arrow, click once.
- **Select a row.** Point to the left border of the row. When the pointer changes to a white, right-pointing arrow, click once.
- **Select a cell.** Triple-click the cell or click its left border.
- **Select multiple cells.** Click the first cell, hold down the Shift key, and press the arrow keys to select adjacent cells in a column or row.

The basic methods for manipulating tables are as follows:

- **Insert a row or column.** Click anywhere in a row or column adjacent to where you want to make the insertion. Then on the Layout tab, in the Rows & Columns group, click the Insert Above, Insert Below, Insert Left, or Insert Right button. Selecting more than one row or column before you click an Insert button inserts that number of rows or columns in the table.

> **Tip** You can insert cells by clicking the Rows & Columns Dialog Box Launcher and specifying in the Insert Cells dialog box how adjacent cells should be moved to accommodate the new cells.

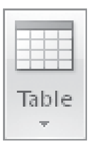
- **Delete a row or column.** Click anywhere in the row or column, and in the Rows & Columns group, click the Delete button. Then click Delete Cells, Delete Columns, Delete Rows, or Delete Table.
- **Size an entire table.** Drag the size handle.
- **Size a single column or row.** Drag a column's right border to the left or right. Drag a row's bottom border up or down.
- **Merge cells.** Create cells that span columns by selecting the cells you want to merge and clicking the Merge Cells button in the Merge group on the Layout tab. For example, to center a title in the first row of a table, you can create one merged cell that spans the table's width.

- **Split cells.** Divide a merged cell into its component cells by clicking Split Cells in the Merge group on the Layout tab.
- **Move a table.** Point to the table, and then drag the move handle that appears in its upper-left corner to a new location. Or use the Cut and Paste buttons in the Clipboard group on the Home tab to move the table.
- **Sort information.** Use the Sort button in the Data group on the Layout tab to sort the rows in ascending or descending order by the data in any column. For example, you can sort a table that has the column headings Name, Address, ZIP Code, and Phone Number on any one of those columns to arrange the information in alphabetical or numerical order.

In this exercise, you will work with two tables. First you'll create a table, enter text, align text in the cells, add rows, and merge cells. Then you'll create a second table by converting existing tabbed text, you'll size a column, and you'll size the entire table.

USE the *Table* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\WordPresenting* folder.

OPEN the *Table* document.



1. Click in the second blank line below *Please complete this form*.
2. On the **Insert** tab, in the **Tables** group, click the **Table** button, point to the upper-left cell, and move the pointer across five columns and down five rows.

   Word highlights the cells as you drag across them and creates a temporary table in the document to show you what the selection will look like.

3. Click the lower-right cell in the selection.

   Word creates a blank table with five columns and five rows. The insertion point is located in the first cell. Because the table is active, Word displays the Table Tools Design and Layout contextual tabs.

4. In the selection area, point to the first row, and then click to select the row.

5. On the **Layout** contextual tab, in the **Merge** group, click the **Merge Cells** button.

   Word combines the five cells in the first row into one cell.

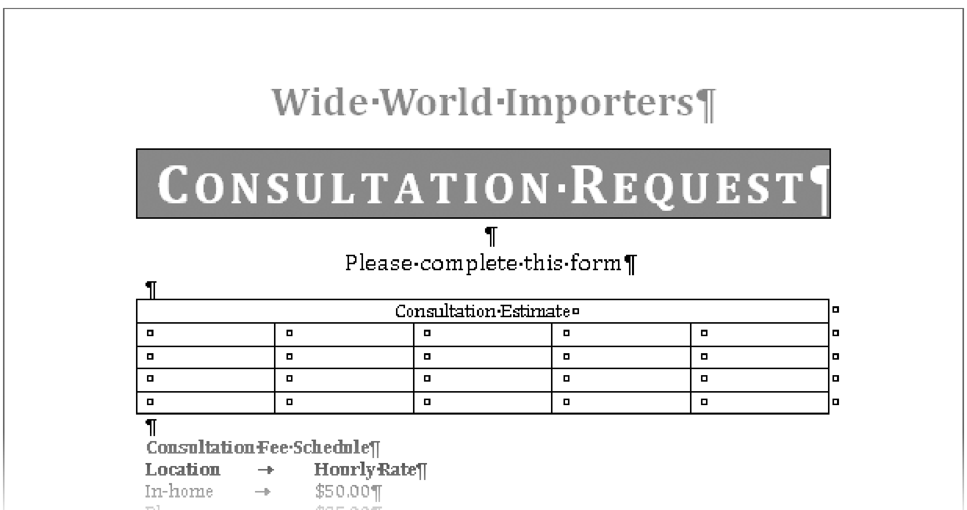
Align Center

6. With the merged cell selected, in the **Alignment** group, click the **Align Center** button.

   The end-of-cell marker moves to the center of the merged cell to indicate that anything you type there will be centered.

7. Type Consultation Estimate.

   The table now has a title.



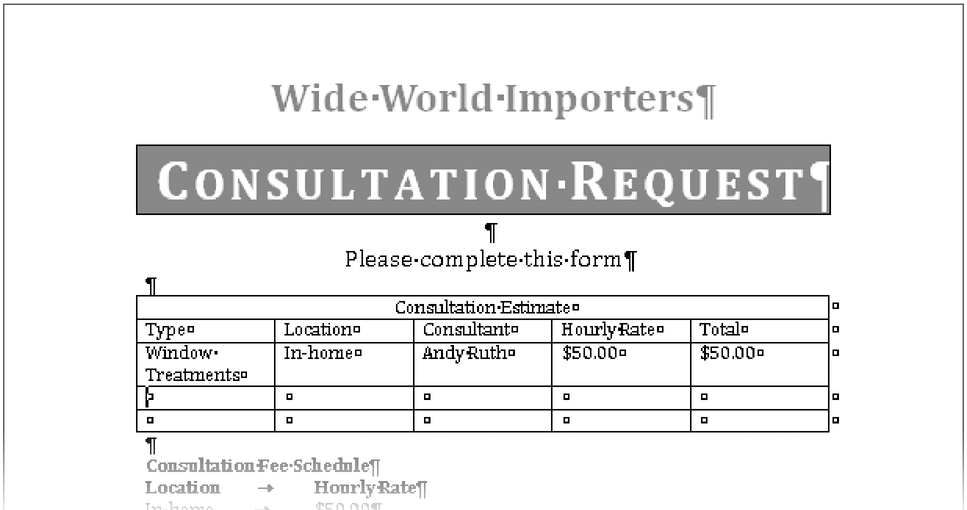
8. Click the first cell in the second row, type Type, and then press Tab.

9. Type **Location**, **Consultant**, **Hourly Rate**, and **Total**, pressing Tab after each entry.

   The table now has a row of column headings. Pressing Tab after the *Total* heading moves the insertion point to the first cell of the third row.

10. Type **Window Treatments**, **In-home**, **Andy Ruth**, **$50.00**, and **$50.00**, pressing Tab after each entry.

    You have entered a complete row of data.



11. Select the last two rows, and then on the **Layout** tab, in the **Rows & Columns** group, click the **Insert Below** button.

    Word adds two new rows and selects them.

12. In the last row, click the first cell, hold down the Shift key, and then press the → key four times to select the first four cells in the row.

13. In the **Merge** group, click the **Merge Cells** button.

    Word combines the selected cells into one cell.


Align Center Right

14. In the **Alignment** group, click the **Align Center Right** button.

15. Type **Subtotal**, and then press Tab twice.

    Word adds a new row with the same structure to the bottom of the table.

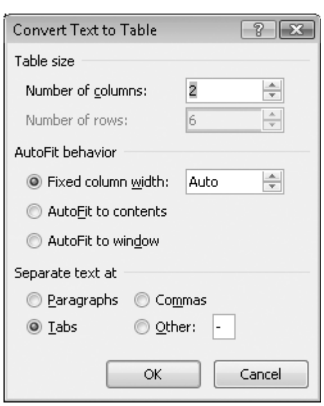
16. Type **Add trip fee**, press Tab twice to add a new row, and then type **Add additional time charge**.

17. Press Tab twice to add a new row, and then type **Total**.

18. Scroll to the bottom of the document, and select the rows of the tabular list beginning with *Distance* and ending with *$20.00*.

19. On the **Insert** tab, in the **Tables** group, click the **Table** button, and then click **Convert Text to Table**.

    The Convert Text To Table dialog box opens.



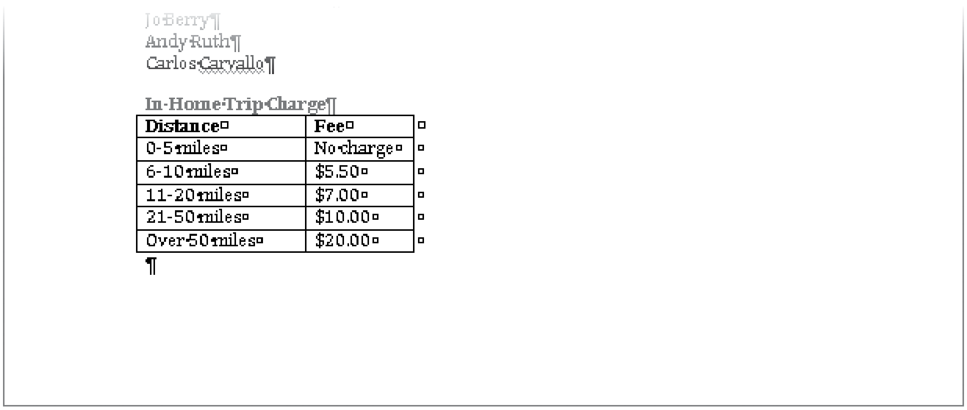
> **Tip** To convert a table to text, select the table, and then click the Convert To Text button in the Data group on the Layout tab.

20. Verify that the **Number of columns** box displays **2**, and then click **OK**.

    The selected text appears in a table with two columns and six rows.

21. Click anywhere in the table to release the selection, and point to the right border of the table. When the pointer changes to two opposing arrows, double-click the right border.

    Word adjusts the width of the right column so that it is exactly wide enough to contain its longest line of text.


Jo Berry¶
Andy Ruth¶
Carlos Carvallo¶

In-Home Trip Charge¶

Distance	Fee
0-5 miles	No charge
6-10 miles	$5.50
11-20 miles	$7.00
21-50 miles	$10.00
Over 50 miles	$20.00

¶

22. Point to the **In-Home Trip Charge** table.

    Word displays the move handle in the upper-left corner and the size handle in the lower-right corner.

23. Drag the size handle to the right, releasing the mouse button when the right edge of the table aligns approximately with the 4-inch mark on the horizontal ruler.

CLOSE the *Table* document without saving your changes.

Other Layout Options

You can control many aspects of a table by clicking Properties in the Table group on the Layout tab to display the Table Properties dialog box. You can then set the following options:

- On the Table tab, you can specify the preferred width of the entire table, as well as the way it interacts with the surrounding text.
- On the Row tab, you can specify the height of each row, whether a row is allowed to break across pages, and whether a row of column headings should be repeated at the top of each page.

> **Tip** The Repeat As Header Row option is available only if the insertion point is in the top row of the table.

- On the Column tab, you can set the width of each column.
- On the Cell tab, you can set the preferred width of cells and the vertical alignment of text within them.

> **Tip** You can also control the widths of selected cells by using the buttons in the Cell Size group on the Layout contextual tab.

- You can control the margins of cells (how close text comes to the cell border) by clicking the Options button on either the Table or Cell tab.

> **Tip** You can also control the margins by clicking the Cell Margins button in the Alignment group on the Layout contextual tab.

If the first row of your table has several long headings that make it difficult to fit the table on one page, you can turn the headings sideways. Simply select the heading row and click the Text Direction button in the Alignment group on the Layout tab.

Formatting Table Information

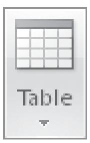
Formatting a table to best convey its data is often a process of trial and error. With Word 2007, you can quickly get started by creating a ***quick table***, a preformatted table with sample data that you can customize. You can then apply one of the ***table styles*** available on the Design contextual tab, which include a variety of borders, colors, and other attributes to give the table a professional look.

To customize the appearance of a quick table or a table you have created from scratch, you can use the buttons on the Design and Layout contextual tabs. You can also use buttons in the Paragraph group on the Home tab to change alignment and spacing. You can format the text by using the buttons in the Font group, just as you would to format any text in a Word document. You can also apply character formatting from the Styles gallery.

In this exercise, you will create a quick table and then apply a table style to it. You will then change some of the text attributes and modify the borders and shading in various cells to make the formatting suit the table's data. There are no practice files for this exercise.

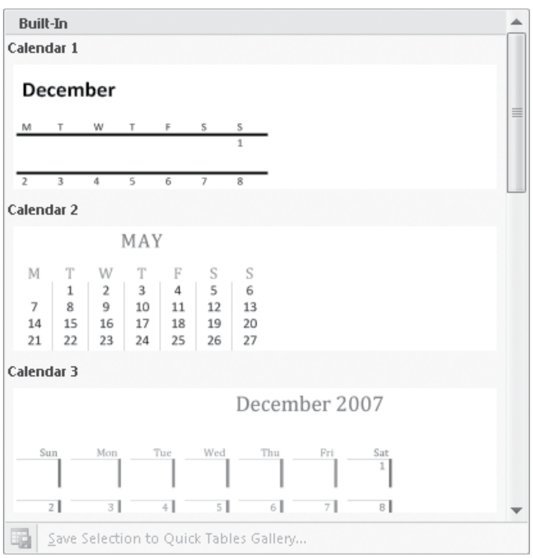
BE SURE TO display non-printing characters before starting this exercise.

OPEN a new, blank document.



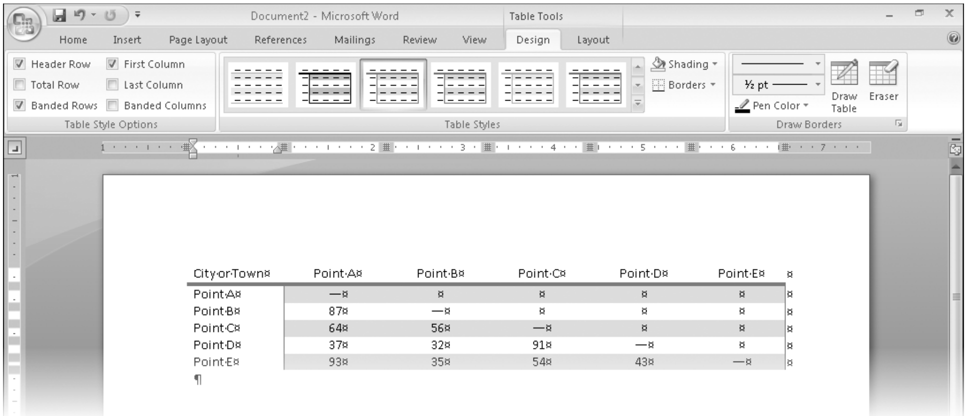
1. With the Zoom level at 100%, on the **Insert** tab, in the **Tables** group, click the **Table** button, and then point to **Quick Tables**.

   The Quick Tables gallery opens.



2. Scroll through the gallery, noticing the types of tables that are available, and then click **Matrix**.

   Word inserts the selected table and displays the Design contextual tab. Notice that the table data includes headings across the top and down the left column. Some of the cells are blank, and obviously have less importance than the cells that contain numbers. The table does not include summary data, such as totals.

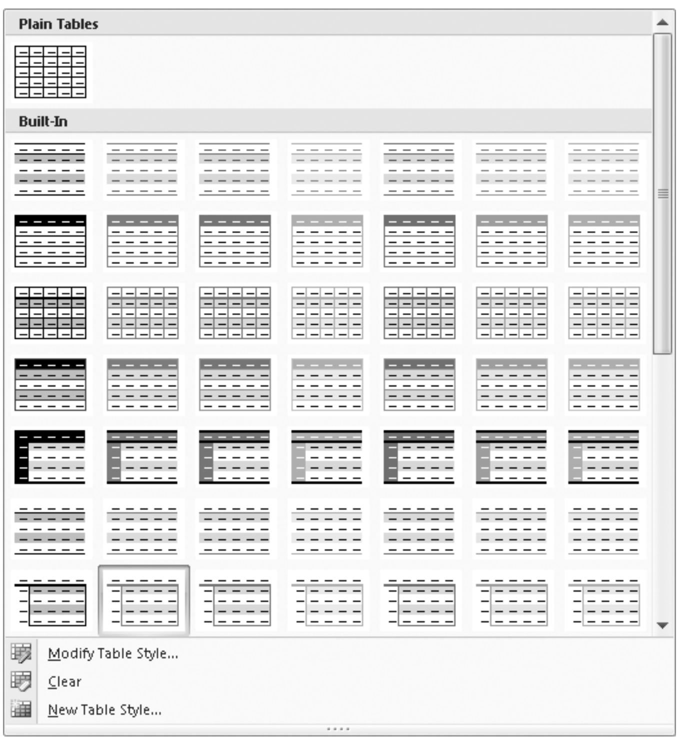


3. On the **Design** tab, in the **Table Style Options** group, clear the **Banded Rows** check box.


More

4. In the **Table Styles** group, point to each style in turn to see its live preview, and then click the **More** button.

   Word displays the Table Styles gallery.

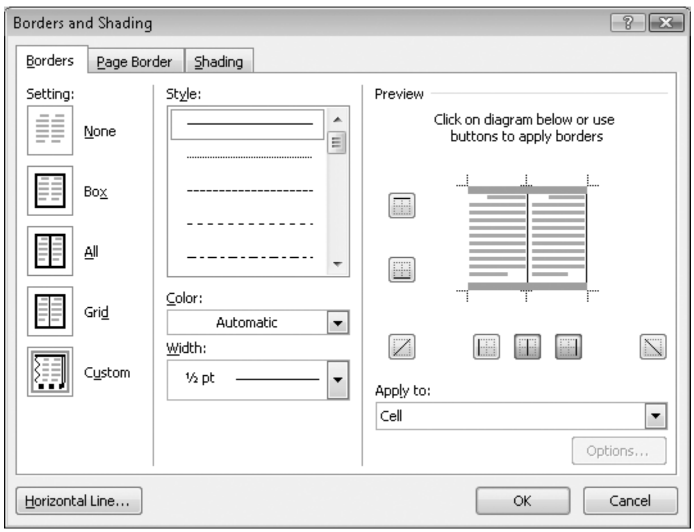


5. Explore all the styles in the gallery. When you finish exploring, click the **Medium Shading 2 – Accent 2** thumbnail.

You need to modify this style a bit, but it is a good starting point.

6. Select all the white cells by dragging through them. Then in the **Table Styles** group, click the **Borders** arrow, and in the list, click **All Borders**.
7. Select all the cells in the last row (*Point E*) by clicking to its left, and in the **Table Styles** group, in the **Borders** list, click **Borders and Shading**.

   The Borders And Shading dialog box opens, displaying the borders applied to the selected cells. The thick gray borders in the Preview area indicate that different borders are applied to different cells in the selection.



8. In the **Preview** area, click the bottom border of the diagram twice to remove all bottom borders.
9. Click the **Color** arrow, and then in the **Theme Colors** area, click the black box (**Black, Text 1**).
10. Click the **Width** arrow, and then in the list, click **2 1/4 pt**.
11. In the **Preview** area, click the bottom border of the diagram, and then click **OK**.

    The table now has the same border at the top and bottom.
12. Select the empty cells in the *Point A* row. In the **Table Styles** group, click the **Shading** arrow, and then in the **Theme Colors** area, click the lightest burgundy box (**Red, Accent 2, Lighter 80%**).
13. Repeat step 12 for all the remaining blank cells in the table.
14. Select the dash in the cell at the junction of the *Point A* column and the *Point A* row, hold down the Ctrl key, and select the other four dashes.

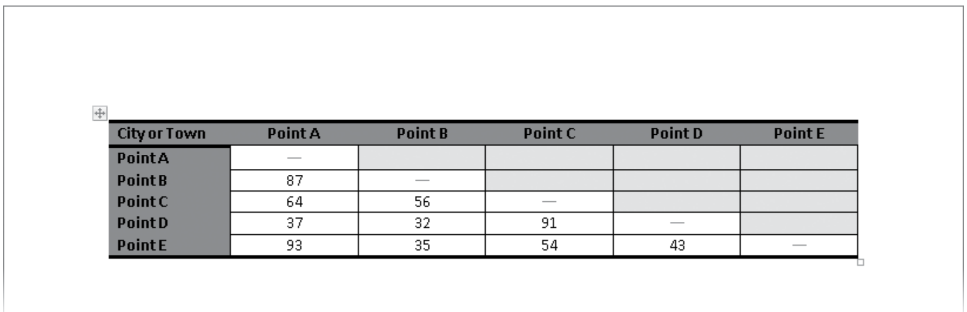
15. On the **Mini toolbar**, click the **Font Color** arrow, and then in the **Standard Colors** area of the palette, click the bright **Red** box.

> **Troubleshooting** If the Mini toolbar doesn't appear, click the Font Color arrow in the Font group on the Home tab.

Show/Hide ¶

16. Click outside the table to release the selection, and then in the **Paragraph** group, click the **Show/Hide ¶** button to hide non-printing characters.

You can now judge how well the table displays its data.



City or Town	Point A	Point B	Point C	Point D	Point E
Point A	—				
Point B	87	—			
Point C	64	56	—		
Point D	37	32	91	—	
Point E	93	35	54	43	—

CLOSE the document without saving your changes.

Performing Calculations in a Table

When you want to perform a calculation on numbers in a Word table, you can create a *formula* that uses a built-in mathematical function. You construct a formula by using the tools in the Formula dialog box, which you can access by clicking Formula in the Data group on the Layout contextual tab. A formula consists of an equal sign (=), followed by a function name (such as SUM), followed by parentheses containing the location of the cells on which you want to perform the calculation. For example, the formula =SUM(Left) totals the cells to the left of the cell containing the formula.

To use a function other than SUM in the Formula dialog box, you click the function you want in the Paste Function list. You can use built-in functions to perform a number of calculations, including averaging (AVERAGE) a set of values, counting (COUNT) the number of values in a column or row, or finding the maximum (MAX) or minimum (MIN) value in a series of cells.

Creating Table Styles

If none of the predefined table styles meets your needs, you can create your own styles for tables in much the same way you create styles for regular text.

To create a table style:

1. On the **Design** tab, in the **Table Styles** group, click the **More** button, and then click **New Table Style**.

   The Create New Style From Formatting dialog box opens.

2. In the **Name** box, type a name for the new style.
3. Click the **Apply formatting to** arrow, and in the list, select the table element for which you are creating the new style.
4. Select the formatting options you want, until the table shown in the Preview area looks the way you want it.
5. If you want the style to be available to tables in other documents based on this template, select that option, and then click **OK**.

To apply a custom table style:

1. Select the table element to which you want to apply the new style.
2. On the **Design** tab, in the **Table Styles** group, click the **More** button, and in the **Custom** area, click the thumbnail for your custom style.

Although formulas commonly refer to the cells above or to the left of the active cell, you can also use the contents of specified cells or constant values in formulas. To use the contents of a cell, you type the ***cell address*** in the parentheses following the function name. The cell address is a combination of the column letter and the row number—for example, A1 is the cell at the intersection of the first column and the first row. A series of cells in a row can be addressed as a range consisting of the first cell and the last cell separated by a colon, such as A1:D1. For example, the formula =SUM(A1:D1) totals the values in row 1 of columns A through D. A series of cells in a column can be addressed in the same way. For example, the formula =SUM(A1:A4) totals the values in column A of rows 1 through 4.

When the built-in functions don't meet your needs, you can insert an Excel worksheet in a Word document. Part of the Microsoft Office system, Excel includes sophisticated functions for performing mathematical, accounting, and statistical calculations.

For example, you can use an Excel worksheet to calculate loan payments at various interest rates. You can insert Excel worksheet data into a Word document in the following ways:

- **By copying and pasting.** You can open Excel, enter the data and formulas, and then copy and paste the data as a table in a Word document. The data is pasted as regular text, with the formulas converted to their results.
- **By linking.** While pasting Excel worksheet data into a Word document, you can link the version in the document to the original source worksheet. You can then double-click the linked object in the document to open the source worksheet in Excel for editing. After you edit and save the worksheet, you can return to the document, right-click the linked object, and then click Update Link to display the edited version of the data.
- **By embedding.** You can create an Excel worksheet directly in a Word document by clicking the Table button in the Tables group on the Insert tab, and then clicking Excel Spreadsheet. The worksheet is created as an object with Excel row and column headers, and the Excel tabs and groups replace those of Word so that you can enter data and manipulate it using Excel.

> **Tip** If you change a value in a Word table, you must recalculate formulas manually. If you change a value in an Excel worksheet, the formulas are automatically recalculated.

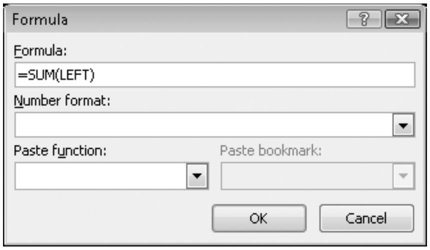
In this exercise, you will perform a few calculations in a Word table. Then you'll copy and paste worksheet data, link the same data, and enter the same data in an Excel object so that you can see the three different ways of working with Excel data.

> **USE** the *Calculations* document and the *LoanData* workbook. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\WordPresenting* folder.
>
> **OPEN** the *LoanData* workbook in Excel, and then open the *Calculations* document in Word.

1. Save the practice file in the *WordPresenting* folder with the name **My Calculations**.

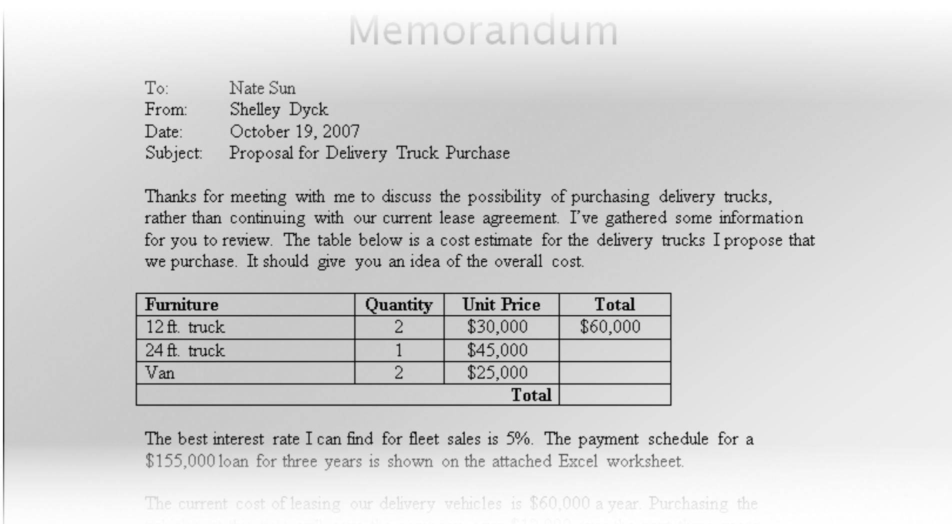
2. In the table displayed in the document, click the cell below the *Total* column heading, and on the **Layout** contextual tab, in the **Data** group, click the **Formula** button.

   The Formula dialog box opens.



3. Select the contents of the **Formula** box, and then type =C2*B2.
4. Click the **Number format** arrow, and in the list, click **$#,##0.00;($#,##0.00)**.
5. In the **Number format** box, delete **.00** from both the positive and negative portions of the format, and then click **OK**.

   You have told Word to multiply the first dollar amount below *Unit Price* by the quantity on the same row and to display the result as a whole dollar amount. Word enters the result, $60,000, in the cell containing the formula.



Memorandum

To: Nate Sun
From: Shelley Dyck
Date: October 19, 2007
Subject: Proposal for Delivery Truck Purchase

Thanks for meeting with me to discuss the possibility of purchasing delivery trucks, rather than continuing with our current lease agreement. I've gathered some information for you to review. The table below is a cost estimate for the delivery trucks I propose that we purchase. It should give you an idea of the overall cost.

Furniture	Quantity	Unit Price	Total
12 ft. truck	2	$30,000	$60,000
24 ft. truck	1	$45,000	
Van	2	$25,000	
		Total	

The best interest rate I can find for fleet sales is 5%. The payment schedule for a $155,000 loan for three years is shown on the attached Excel worksheet.

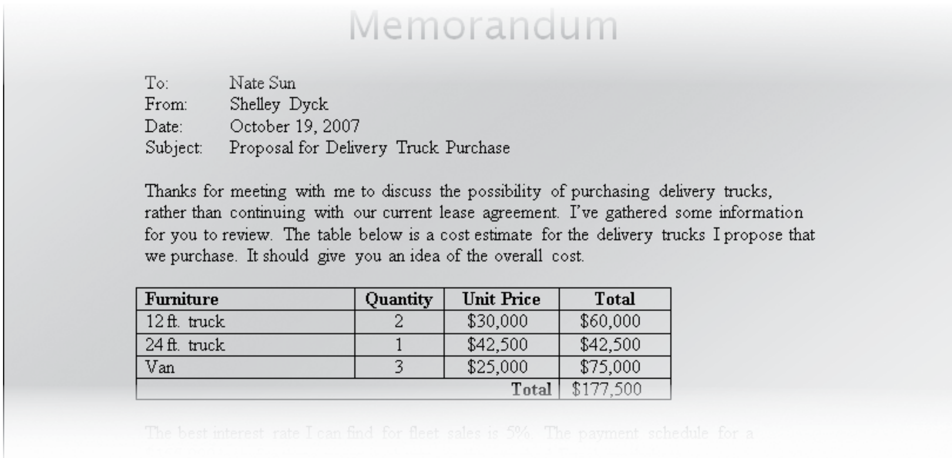
The current cost of leasing our delivery vehicles is $60,000 a year. Purchasing the

6. Repeat steps 2 through 5 for the next two cells below *Total*, adjusting the cell addresses appropriately.
7. In cell **B4**, change **2** to 3, right-click the formula in cell **D4**, and then click **Update Field**.

   Word recalculates the formula and enters the new result, $75,000, in the cell.
8. Change the **Unit Price** of the **24 ft. truck** to $42,500, and then update the corresponding total.

9. Click cell **D5**, and in the **Data** group, click the **Formula** button.
10. With **=SUM(ABOVE)** in the **Formula** box, set the **Number format** to whole dollar amounts (following the method in steps 3 and 4), and then click **OK**.

    You have told Word to add the amounts in the *Total* column. Word enters the result, $177,500, in the cell containing the formula.



Memorandum

To: Nate Sun
From: Shelley Dyck
Date: October 19, 2007
Subject: Proposal for Delivery Truck Purchase

Thanks for meeting with me to discuss the possibility of purchasing delivery trucks, rather than continuing with our current lease agreement. I've gathered some information for you to review. The table below is a cost estimate for the delivery trucks I propose that we purchase. It should give you an idea of the overall cost.

Furniture	Quantity	Unit Price	Total
12 ft. truck	2	$30,000	$60,000
24 ft. truck	1	$42,500	$42,500
Van	3	$25,000	$75,000
		Total	$177,500

The best interest rate I can find for fleet sales is 5%. The payment schedule for a

11. Press Ctrl+End to move to the end of the document, and then on the Windows taskbar, click the **Microsoft Excel** button.

> **Troubleshooting** If you have hidden your Windows taskbar, as we have, point to the bottom of the screen to make the taskbar appear so that you can click the Microsoft Excel button.

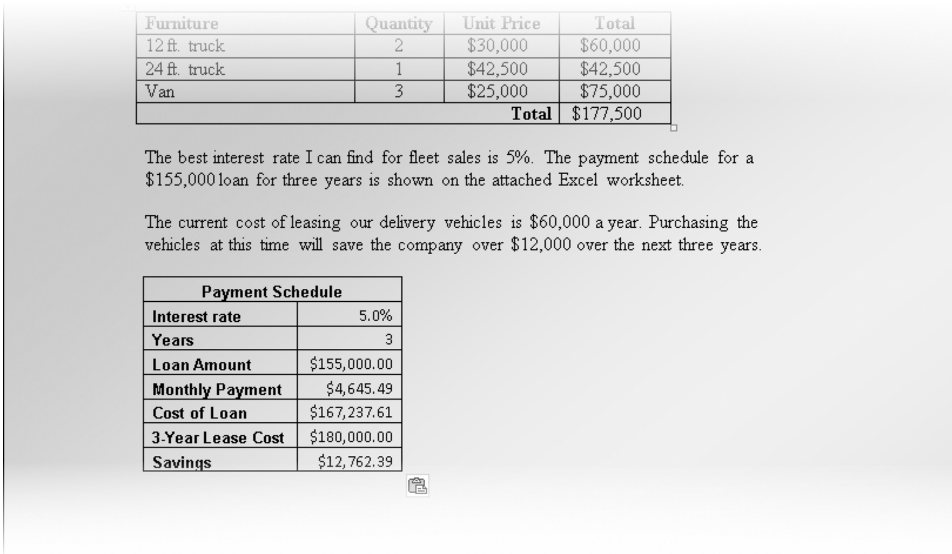
Copy

12. On **Sheet1** of the *LoanData* workbook, select cells **A1:B8** by dragging through them. Then on the **Home** tab, in the **Clipboard** group, click the **Copy** button.

    The worksheet data is copied to the Clipboard. From there it can be pasted into any Microsoft Office program.

13. Redisplay the *My Calculations* document. Then on the **Home** tab, in the **Clipboard** group, click the **Paste** button.

    Word pastes a copy of the worksheet data in the document as a table.



Furniture	Quantity	Unit Price	Total
12 ft. truck	2	$30,000	$60,000
24 ft. truck	1	$42,500	$42,500
Van	3	$25,000	$75,000
		Total	$177,500

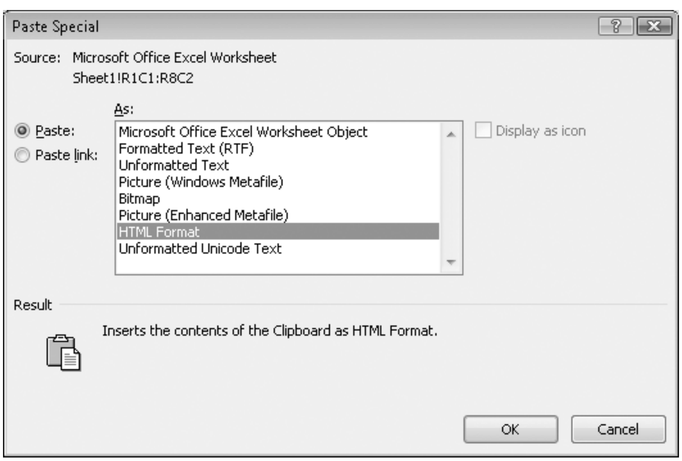
The best interest rate I can find for fleet sales is 5%. The payment schedule for a $155,000 loan for three years is shown on the attached Excel worksheet.

The current cost of leasing our delivery vehicles is $60,000 a year. Purchasing the vehicles at this time will save the company over $12,000 over the next three years.

Payment Schedule	
Interest rate	5.0%
Years	3
Loan Amount	$155,000.00
Monthly Payment	$4,645.49
Cost of Loan	$167,237.61
3-Year Lease Cost	$180,000.00
Savings	$12,762.39

14. Press Enter, and then in the **Clipboard** group, click the **Paste** arrow, and click **Paste Special**.

The Paste Special dialog box opens.



15. In the **As** list, click **Microsoft Office Excel Worksheet Object**, click **Paste link**, and then click **OK**.

Word pastes a second copy of the worksheet data as a linked table on a new page.

16. Double-click the new table.

    The linked worksheet opens in Excel.

17. Click cell **B2**, type 6, and then press Enter.

> **Troubleshooting** If someone has already worked through this exercise using the practice files on your computer, 6.0% might already appear in cell B2. In that case, change the value to 5.0%.

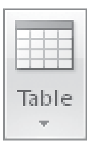
Excel recalculates the formulas in the worksheet to reflect the new interest rate.

18. Save and close the workbook, and exit Excel.

19. In Word, right-click the linked table, and then click **Update Link**.

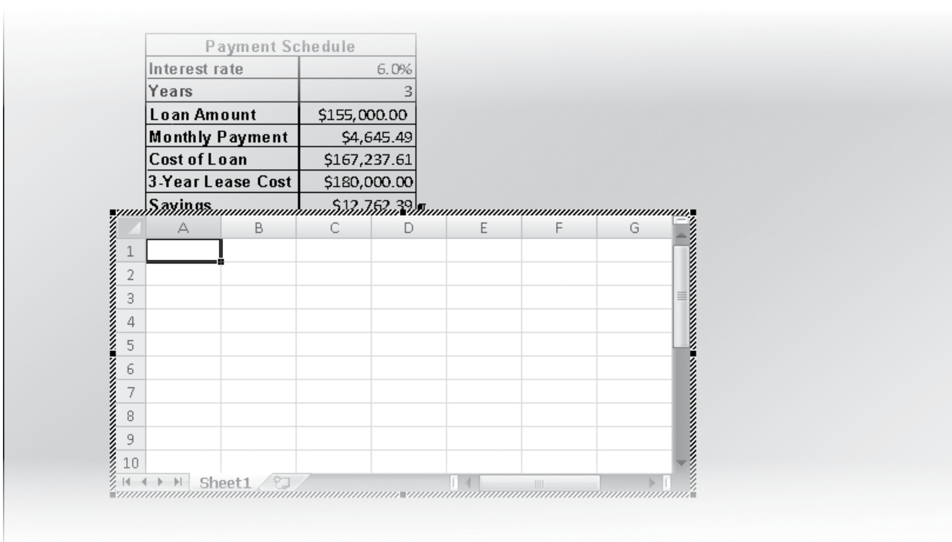
    Word updates the table to reflect the change you made to the worksheet data.

20. Press Ctrl+End to move to the end of the document, press Enter twice to add some space, and then save the document.



21. On the **Insert** tab, in the **Tables** group, click the **Table** button, and then click **Excel Spreadsheet**.

    Word inserts an Excel object in the document.



22. In row **1**, type Rate, press Tab, and then type 5%.

23. Type the following in rows **2**, **3**, and **4**:

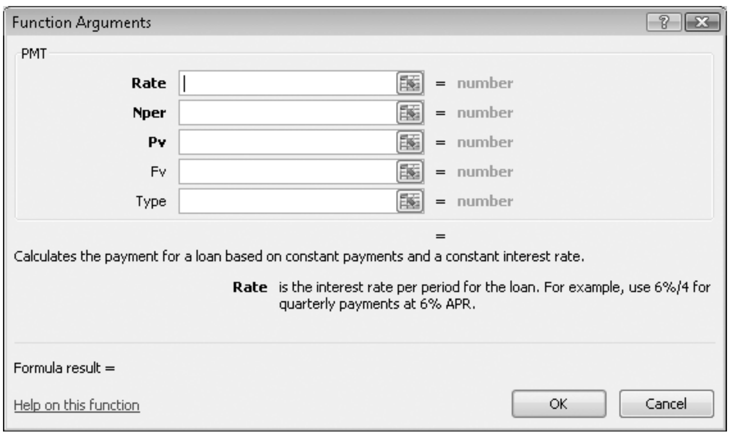
2 Years Tab 3

3 Amount Tab $155,000

4 Payment Tab

24. With cell **B4** active, on the **Formulas** tab, in the **Function Library** group, click the **Financial** button, scroll the list, and then click **PMT**.

Excel enters =PMT() in cell B4 and then opens the Function Arguments dialog box so that you can enter the information needed to calculate the monthly payment on a loan of $155,000 at 5% interest for three years.



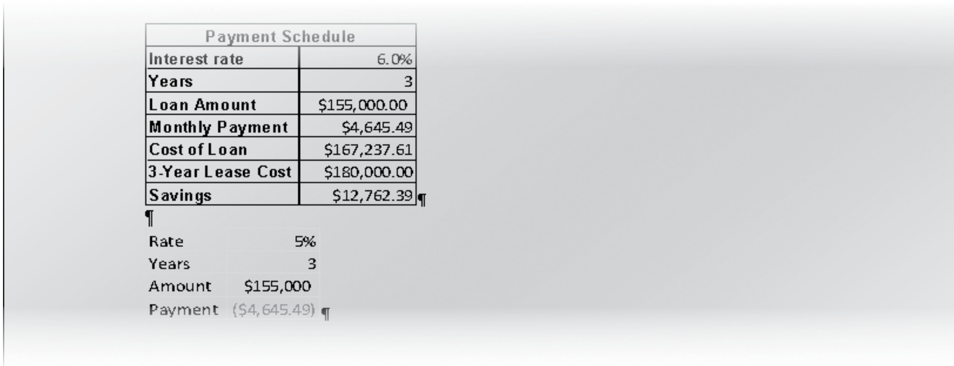
25. In the **Rate** box, type B1/12 (the annual rate per month), in the **Nper** box, type B2*12 (the number of years expressed as months), and in the **Pv** box, type B3. Then click **OK**.

Excel calculates the formula and enters the result, $4,645.49, expressed as a negative because it is money you are paying out.

> **Tip** To express the payment as a positive, you can insert a minus sign between the equal sign and PMT in the formula.

26. Drag the black handle in the lower-right corner of the Excel object up and to the left, until the frame of the object is just big enough to enclose the cells with data in them. Then click a blank area of the page to deactivate the object.

The object appears on the page as a table with barely visible borders around its cells.



Payment Schedule	
Interest rate	6.0%
Years	3
Loan Amount	$155,000.00
Monthly Payment	$4,645.49
Cost of Loan	$167,237.61
3-Year Lease Cost	$180,000.00
Savings	$12,762.39

Rate	5%
Years	3
Amount	$155,000
Payment	($4,645.49)

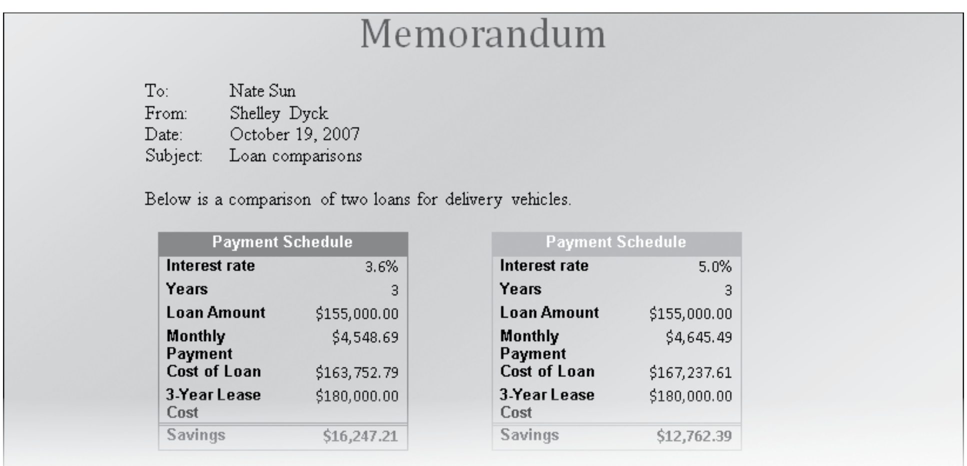
27. Double-click the object to activate it in Excel again, change the entry in cell **B1** to 7%, press Enter, and then click a blank area of the page.

The object's formulas have updated the monthly payment to reflect the change.

CLOSE the *My Calculations* document without saving your changes.

Using a Table to Control Page Layout

Most people are accustomed to thinking of a table as a means of displaying data in a quick, easy-to-grasp format. But tables can also serve to organize your pages in creative ways. For example, suppose you want to display two tables next to each other. The simplest way to do this is to first create a table with one tall row and two wide columns and no gridlines. You can then insert one table in the first cell and the other table in the second cell. These ***nested tables*** then appear to be arranged side by side.



Memorandum

To: Nate Sun
From: Shelley Dyck
Date: October 19, 2007
Subject: Loan comparisons

Below is a comparison of two loans for delivery vehicles.

Payment Schedule	
Interest rate	3.6%
Years	3
Loan Amount	$155,000.00
Monthly Payment	$4,548.69
Cost of Loan	$163,752.79
3-Year Lease Cost	$180,000.00
Savings	$16,247.21

Payment Schedule	
Interest rate	5.0%
Years	3
Loan Amount	$155,000.00
Monthly Payment	$4,645.49
Cost of Loan	$167,237.61
3-Year Lease Cost	$180,000.00
Savings	$12,762.39

Deciding How to Insert Excel Data

To decide how to insert Excel data in a Word document, you need to understand how Microsoft Office system programs integrate data from outside sources. Understanding this will enable you to decide how to use information created in any other Office program, not just Excel.

If you don't need to maintain a connection with the source Excel worksheet and the data is simple enough to be edited in Word, you can copy and paste the data.

If you do need to maintain a connection with the source Excel worksheet, or if you need to be able to manipulate the data in Excel after it is incorporated into the Word document, you can use the Microsoft linking and embedding technology to insert an ***object*** (a file or part of a file) created in Excel into a document created in Word. The object is sometimes called the ***source file***, and the document into which you are inserting the information is called the ***destination file***. The difference between linking and embedding is the type of connection that is maintained between the source and destination files, as follows:

- A ***linked object*** is displayed in the destination file, but its data is stored in the source file. If you want to change the data, you do it in the source file. Then when you open the destination file, the linked object is updated to reflect the change.
- An ***embedded object*** is displayed in the destination file and its data is stored there. If you want to update the data, you do it in the destination file using the source program.

Whether an object should be linked or embedded depends on whether you need the information in the destination file to always be the same as the information in the source file. If you do, it is best to link the object so that you don't have to manually update the data in two places.

As with regular tables, you can create a nested table from scratch, by formatting existing information, or by inserting Excel data. And just like other tables, you can format a nested table either manually or using one of Word's ready-made table styles.

Tip Tables can be used to organize a mixture of elements such as text, tables, charts, and diagrams. For more information, you might want to consult *Advanced Documents Inside Out* (Microsoft Press, 2007).

When creating a table to contain other elements, you might want to take advantage of the Word table-drawing feature. If you click Draw Table below the grid displayed when you click the Table button, the pointer changes to a pencil with which you can draw cells on the page. You can set up the container table visually, without having to fuss with dialog boxes and precise dimensions while you are designing the layout. Then after everything is set up the way you want it, you can use the Table Properties dialog box to fine-tune the table specifications.

In this exercise, you will draw a table to contain two other tables. You will then insert and format the nested tables.

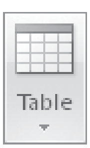
USE the *Loan* workbook and the *Memo* and *TableAsLayout* documents. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\WordPresenting* folder.

BE SURE TO display non-printing characters before starting this exercise.

OPEN the *Loan* workbook in Excel, and then open the *Memo* document and the *TableAsLayout* document in Word.

1. Before you begin, save a copy of the *TableAsLayout* document in the *WordPresenting* folder as **My Nested Tables**.

> **Troubleshooting** The operations you perform in this exercise use a lot of your computer's resources. You will have better results if you save the My Nested Tables document regularly.



2. In the *My Nested Tables* document, on the **Insert** tab, in the **Tables** group, click the **Table** button, and then click **Draw Table**.

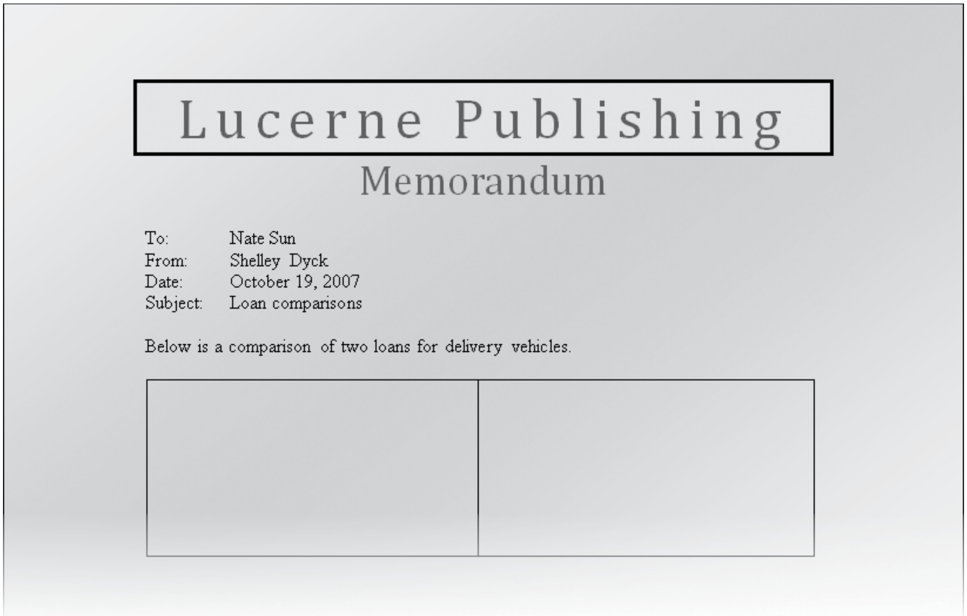
   The pointer becomes a pencil.

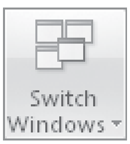
3. Point below the last paragraph mark in the document, and drag across and down to create a cell about 3 inches wide and 1½ inches tall.

> **Tip** The location of the pencil is marked with guides on the horizontal and vertical rulers. You can use these guides to help you draw cells of specific dimensions.

4. Point to the upper-right corner of the cell (you don't have to be precise), and drag to create another cell about the same size as the first.

   When you release the mouse button, Word joins the two cells to create the structure of a table.





5. On the **View** tab, in the **Window** group, click the **Switch Windows** button, and then click *Memo*.
6. Scroll to the bottom of the page, click anywhere in the *Payment Schedule* table, and on the **Layout** tab, in the **Table** group, click **Select**, and then click **Select Table**.

Copy

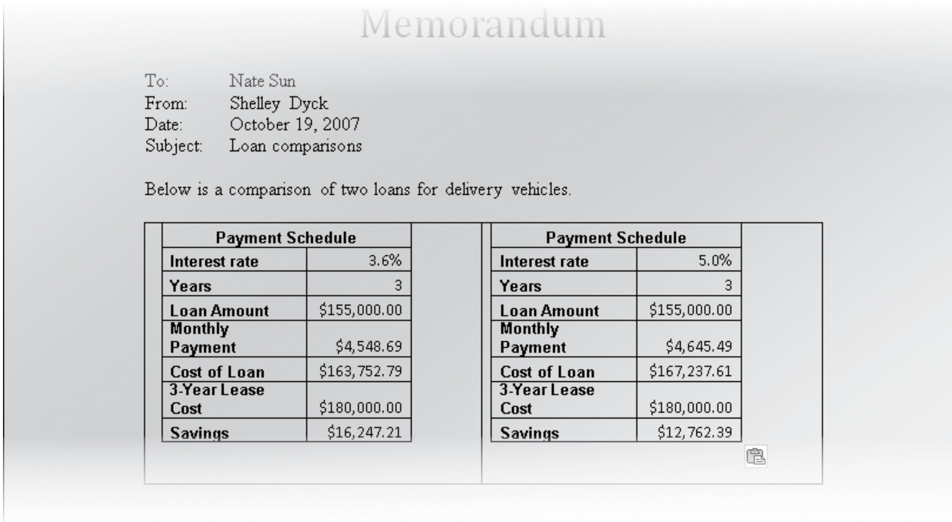
7. On the **Home** tab, in the **Clipboard** group, click the **Copy** button.
8. Switch to the *My Nested Tables* document, right-click the first cell in the table, and then click **Paste as Nested Table**.

   Word inserts the table you copied into the cell and adjusts the size of the container table to fit the size of the nested table.
9. On the Windows taskbar, click the **Microsoft Excel** button to activate Sheet1 of the *Loan* workbook, select cells **A1:B8**, and then on the **Home** tab, in the **Clipboard** group, click the **Copy** button.

10. Switch back to the *My Nested Tables* document, click the second cell in the table, and then on the **Home** tab, in the **Clipboard** group, click the **Paste** button.

    Word inserts the worksheet data as a nested table in the cell.

> **Troubleshooting** If the pasted table doesn't appear in the container table, minimize the document window and then maximize it.



Memorandum

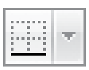
To: Nate Sun
From: Shelley Dyck
Date: October 19, 2007
Subject: Loan comparisons

Below is a comparison of two loans for delivery vehicles.

Payment Schedule	
Interest rate	3.6%
Years	3
Loan Amount	$155,000.00
Monthly Payment	$4,548.69
Cost of Loan	$163,752.79
3-Year Lease Cost	$180,000.00
Savings	$16,247.21

Payment Schedule	
Interest rate	5.0%
Years	3
Loan Amount	$155,000.00
Monthly Payment	$4,645.49
Cost of Loan	$167,237.61
3-Year Lease Cost	$180,000.00
Savings	$12,762.39

11. Move the pointer to the selection area adjacent to the container table, and then click to select its two cells.



Borders

12. On the **Home** tab, in the **Paragraph** group, click the **Borders** arrow, and then in the list, click **No Border**.

    Word removes the borders from the container cells.

13. Click anywhere in the left table, and on the **Design** contextual tab, in the **Table Style Options** group, select the **Header Row** and **Total Row** check boxes, and clear all the other check boxes.

14. In the **Table Styles** group, display the **Table Styles** gallery, and click the thumbnail of a table style that you want to apply to the nested table.

    We used Light List – Accent 4.

15. Repeat steps 13 and 14 to format the right table, perhaps using a similar table style with a different color.

    We used Light List – Accent 6.

16. Turn off non-printing characters to see the results.

    The nested tables now look as shown at the beginning of this topic.

CLOSE the *My Nested Tables* document, saving your changes. Then close the *Memo* document, and exit Word. Finally, close the *Loan* workbook without saving changes, and exit Excel.

Key Points

- To vary the layout of a document, you can divide text into columns.
- If your data is simple, you can create the look of a table by using tabs to set up the data as a tabular list.
- Word comes with quick tables that you can use as a starting point for creating professional, easy-to-read table formats.
- If you have already created a table, you can format it quickly by applying a table style. You can enhance the style by applying text attributes, borders, and shading.
- Formulas that perform simple calculations are easy to build in Word. For more complex calculations, you can create an Excel worksheet and then insert the worksheet data as a table in the Word document.
- Tables are great tools for organizing different types of information on the page. By using tables in creative ways, you can place information in non-linear arrangements for easy comparison or analysis.

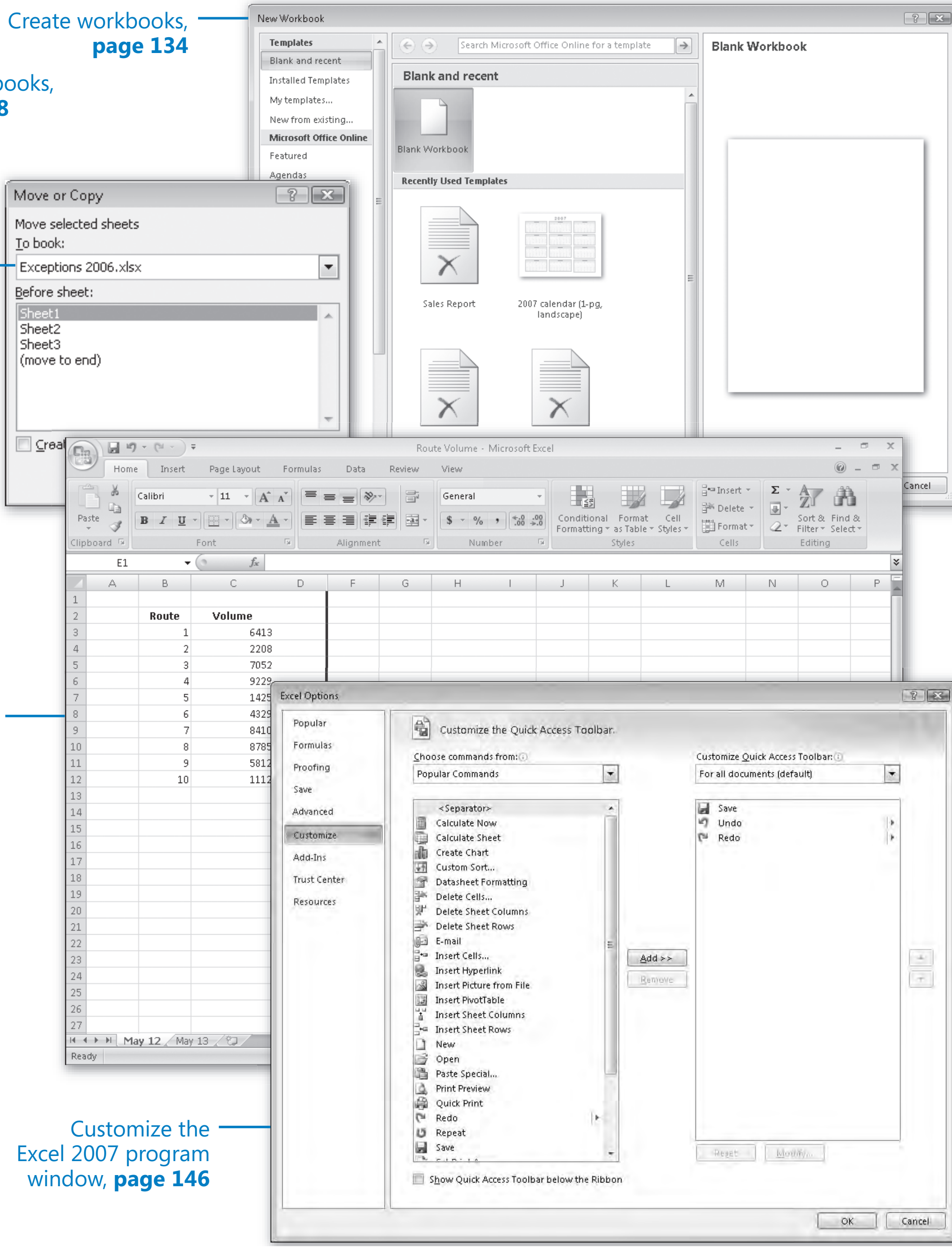
Part II

Microsoft Office Excel 2007

Chapter at a Glance

Create workbooks, **page 134**

Modify workbooks, **page 138**



Modify worksheets, **page 141**

Customize the Excel 2007 program window, **page 146**

5 Setting Up a Workbook

In this chapter, you will learn how to:

- ✔ Create workbooks.
- ✔ Modify workbooks.
- ✔ Modify worksheets.
- ✔ Customize the Excel 2007 program window.

When you start Microsoft Office Excel 2007, the program presents a blank workbook that contains three worksheets. You can add or delete worksheets, hide worksheets within the workbook without deleting them, and change the order of your worksheets within the workbook. You can also copy a worksheet to another workbook or move the worksheet without leaving a copy of the worksheet in the first workbook. If you and your colleagues work with a large number of documents, you can define property values to make your workbooks easier to find when you and your colleagues attempt to locate them by using the Windows search facility.

Another way to make Excel 2007 easier to use is by customizing the Excel 2007 program window to fit your work style. If you have several workbooks open at the same time, you can move between the workbook windows by using the new user interface. However, if you switch between workbooks frequently, you might find it easier to resize the workbooks so they don't take up the entire Excel 2007 window. In that case, you just need to click the title bar of the workbook you want to display.

The 2007 Microsoft Office system design team created the new user interface to reduce the number of places you have to look for commands; if you find that you use a command frequently, you can add it to the Quick Access Toolbar so it's never more than one click away.

In this chapter, you learn how to create and modify workbooks, create and modify worksheets, make your workbooks easier to find, and customize the Excel 2007 program window.

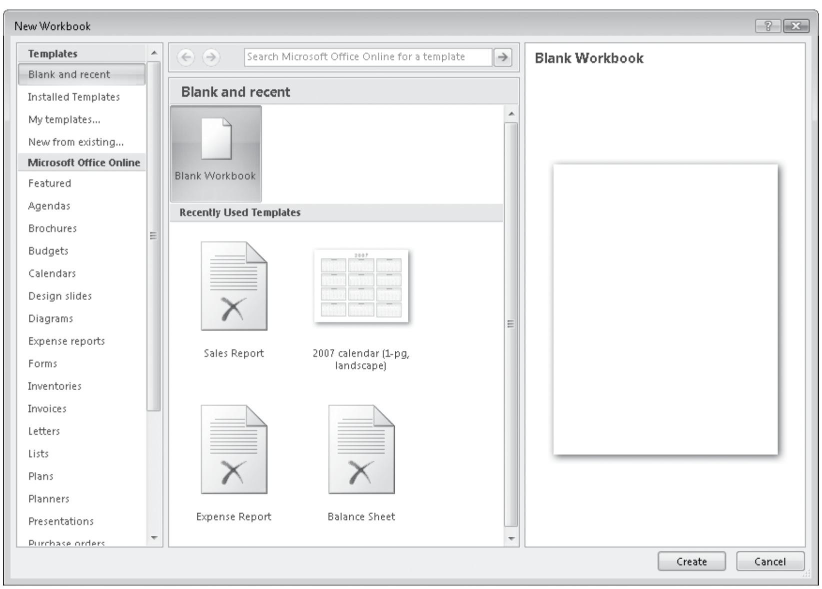
See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Creating Workbooks

Every time you want to gather and store data that isn't closely related to any of your other existing data, you should create a new workbook. The default new workbook in Excel 2007 has three worksheets, although you can add more worksheets or delete existing worksheets if you want. Creating a new workbook is a straightforward process—you just click the Microsoft Office Button, click New, and identify the type of workbook you want to create.



When you start Excel 2007, the program displays a new, blank workbook; you can begin to enter data in the worksheet's cells or open an existing workbook. In the exercises

that follow, you'll work with some of the workbooks that have already been created for Consolidated Messenger. After you make any desired changes to a workbook, you should save the workbook to avoid losing your work.

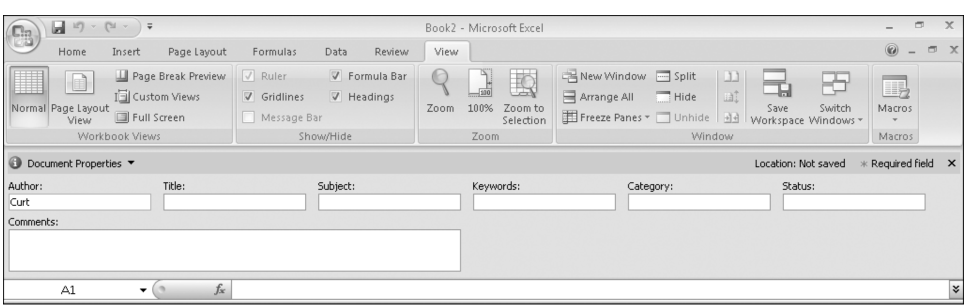
When you save a file, you overwrite the previous copy of the file. If you have made changes that you want to save, but you want to keep a copy of the file as it was previously, you can use the Save As command to specify a name for the new file.

> **Tip** Readers frequently ask, "How often should I save my files?" It is good practice to save your changes every half hour or even every five minutes, but the best time to save a file is whenever you make a change that you would hate to have to make again.

You also can use the controls in the Save As dialog box to specify a different format for the new file and a different location in which to save the new version of the file. For example, Jenny Lysaker, the chief operating officer of Consolidated Messenger, might want to save an Excel file that tracks consulting expenses as an Excel 2003 file if she needs to share the file with a consulting firm that uses Excel 2003.

After you create a file, you can add additional information to make the file easier to find when you search for it using the Windows search facility. Each category of information, or ***property***, stores specific information about your file. In Windows, you can search for files based on the file's author or title, or by keywords associated with the file. A file tracking the postal code destinations of all packages sent from a collection might have the keywords *postal*, *destination*, and *origin* associated with it.

To set values for your workbook's properties, click the Microsoft Office Button, point to Prepare, and click Properties to display the Document Properties panel on the user interface. The Standard version of the Document Properties panel has fields for the file's author, title, subject, keywords, category, and status, and any comments about the file. You can also create custom properties by clicking the Property Views and Options button, located just to the right of the Document Properties label, and then clicking Advanced Properties.



On the Custom tab of the advanced Properties dialog box, you can click one of the existing custom categories or create your own by typing a new property name in the Name field, clicking the Type arrow and selecting a data type (for example, Text, Date, Number, Yes/No), selecting or typing a value in the Value field, and then clicking Add. If you want to delete an existing custom property, move your mouse pointer down to the Properties list, click the property you want to get rid of, and click Delete. After you finish making your changes, click the OK button. To hide the Document Properties panel on the user interface, click the Close button in the upper-right corner of the panel.

In this exercise, you will create a new workbook, save the workbook with a new name, assign values to the workbook's standard properties, and create a custom property.

> **USE** the *Exception Summary* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelCreating* folder.
>
> **BE SURE TO** start Excel 2007 before beginning these exercises.
>
> **OPEN** the *Exception Summary* workbook.

Microsoft Office Button

1. Click the **Microsoft Office Button**, and then click **Close**.

   The *Exception Summary* workbook closes.

2. Click the **Microsoft Office Button**, and then click **New**.

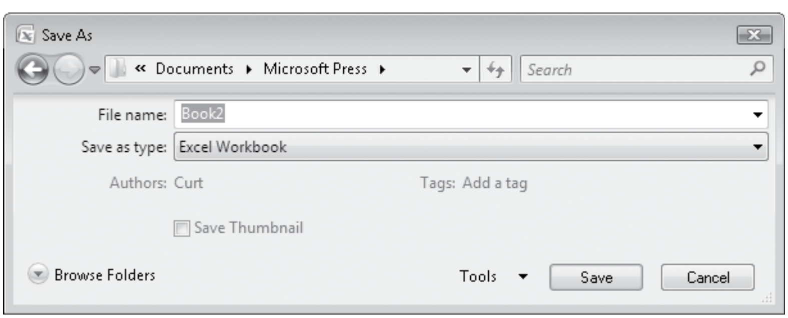
   The New Workbook dialog box opens.

3. Click **Blank Workbook**, and then click **Create**.

   A new, blank workbook opens.

4. Click the **Microsoft Office Button**, and then click **Save As**.

   The Save As dialog box opens.

5. Use the navigation controls to display the *Documents\Microsoft Press\2007OfficeSBS\ExcelCreating* folder. In the **File name** field, type **Exceptions 2006**.

6. Click the **Save** button.

   Excel 2007 saves your work, and the Save As dialog box closes.

7. Click the **Microsoft Office Button**, click **Prepare**, and then click **Properties**.

   The Document Properties pane appears.

8. In the **Keywords** field, type **exceptions, regional, percentage**.

9. In the **Category** field, type **performance**.

10. Click the **Property View and Options** button, and then click **Advanced Properties**.

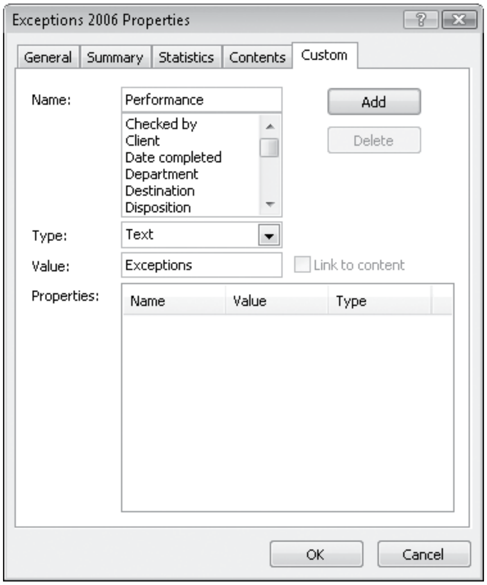
    The Exceptions 2006 Properties dialog box opens.

11. Click **Custom**.

    The Custom tab appears.

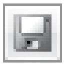
12. In the **Name** field, type **Performance**.

13. In the **Value** field, type **Exceptions**.



14. Click the **Add** button, and then click **OK**.

    The Exceptions 2006 Properties dialog box closes.



Save

15. On the **Quick Access Toolbar**, click the **Save** button to save your work.

CLOSE the *Exceptions 2006* workbook.

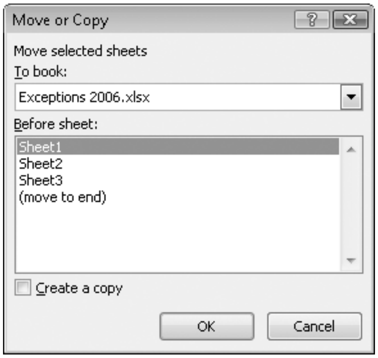
Modifying Workbooks

Most of the time, you create a workbook to record information about a particular business activity, such as the number of packages that a regional distribution center handles or the average time of the last delivery on a route. Each worksheet within that workbook should thus represent a subdivision of that activity. To display a particular worksheet, just click the worksheet's tab on the tab bar (just below the grid of cells).

In the case of Consolidated Messenger, the workbook used to track daily package volumes could have a separate worksheet for each regional distribution center. New Excel 2007 workbooks contain three worksheets; because Consolidated Messenger uses nine regional distribution centers, you need to create six new ones. To create a new worksheet, click the Insert Worksheet button at the right edge of the tab bar.

When you create a worksheet, Excel 2007 assigns it a generic name such as Sheet4, Sheet5, or Sheet6. After you decide what type of data you want to store on a worksheet, you should change the default worksheet names to something more descriptive. For example, you could change the name of Sheet1 in the regional distribution center tracking workbook to *Northeast*. When you want to change a worksheet's name, double-click the worksheet's tab on the tab bar to highlight the worksheet name, type the new name, and press Enter.

Another way to work with more than one workbook is to copy a worksheet from another workbook to the current workbook. One circumstance in which you might consider copying worksheets to the current workbook is if you have a list of your current employees in another workbook. You can copy worksheets from another workbook by right-clicking the tab of the sheet you want to copy and, from the shortcut menu that appears, clicking Move or Copy to display the Move Or Copy dialog box.



> **Tip** Selecting the Create A Copy check box leaves the copied worksheet in its original workbook, whereas clearing the check box causes Excel 2007 to delete the worksheet from its original workbook.

After the worksheets are in the target workbook, you can change their order to make the data easier to locate within the workbook. To change a worksheet's location in the workbook, you drag its sheet tab to the desired location on the tab bar. If you want a worksheet to stand out in a workbook, you can right-click its sheet tab and use the menu that appears to change the tab's color. At the other end of the spectrum, you can hide the active worksheet by right-clicking the worksheet's tab on the tab bar and clicking Hide on the context menu that appears. When you want Excel 2007 to redisplay the worksheet, right-click any visible sheet tab, and click Unhide. In the Unhide dialog box, click the sheet you want to display, and click OK.

> **Tip** If you copy a worksheet to another workbook, and the destination workbook has the same theme applied as the active workbook, the worksheet retains its tab color. If the destination workbook has another theme applied, the worksheet's tab color changes to reflect that theme.

If you determine that you no longer need a particular worksheet, such as one you created to store some figures temporarily, you can delete the worksheet quickly. To do so, right-click its sheet tab, and then click Delete.

In this exercise, you will insert and rename a worksheet, change a worksheet's position in a workbook, hide and unhide a worksheet, copy a worksheet to another workbook, change a worksheet's tab color, and delete a worksheet.

> **USE** the *Exception Summary* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelCreating* folder.
>
> **OPEN** the *Exception Summary* workbook.


Insert Worksheet

1. On the tab bar, click the **Insert Worksheet** button.

   A new worksheet appears.
2. Right-click the new worksheet's sheet tab, and then click **Rename**.

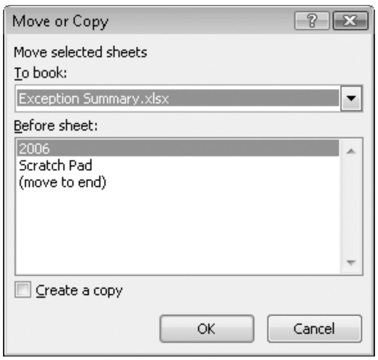
   Excel 2007 highlights the new worksheet's name.
3. Type 2007, and then press Enter.
4. On the tab bar, right-click the **Sheet1** sheet tab, and then click **Rename**.

5. Type 2006, and then press Enter.
6. Right-click the **2006** sheet tab, point to **Tab Color**, and then, in the **Standard Colors** section of the color palette, click a green square.

   Excel 2007 changes the 2006 sheet's tab to green.
7. On the tab bar, drag the **2007** sheet tab to the left of the **Scratch Pad** sheet tab.
8. Right-click the **2007** sheet tab, and then click **Hide**.

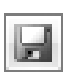
   Excel 2007 hides the 2007 worksheet.
9. Right-click the **2006** sheet tab, and then click **Move or Copy**.

   The Move Or Copy dialog box opens.



10. Click the **To book** arrow, and then in the list, click **New Book**.
11. Select the **Create a copy** check box.
12. Click **OK**.

    A new workbook appears, containing only the worksheet you copied into it.


Save

13. On the **Quick Access Toolbar**, click the **Save** button.

    The Save As dialog box opens.
14. In the **File name** field, type **2006 Archive**, and then press Enter.

    Excel 2007 saves the workbook, and the Save As dialog box closes.

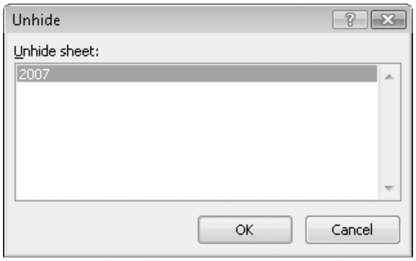
15. On the **View** tab, click the **Switch Windows** button, and then click **Exception Summary**.

    The *Exception Summary* workbook appears.
16. On the tab bar, right-click the **Scratch Pad** sheet tab, and then click **Delete**.

    The Scratch Pad worksheet disappears.

17. Right-click the **2006** sheet tab, and then click **Unhide**.

    The Unhide dialog box opens.



18. Click **2007**, and then click **OK**.

    The Unhide dialog box closes, and the 2007 worksheet appears in the workbook.

CLOSE the *Exception Summary* workbook.

Modifying Worksheets

After you put up the signposts that make your data easy to find, you can take other steps to make the data in your workbooks easier to work with. For instance, you can change the width of a column or the height of a row in a worksheet by dragging the column or row's border to the desired position. Increasing a column's width or a row's height increases the space between cell contents, making it easier to select a cell's data without inadvertently selecting data from other cells as well.

Tip You can apply the same change to more than one row or column by selecting the rows or columns you want to change and then dragging the border of one of the selected rows or columns to the desired location. When you release the mouse button, all the selected rows or columns change to the new height or width.

Modifying column width and row height can make a workbook's contents easier to work with, but you can also insert a row or column between the edge of a worksheet and the cells that contain the data to accomplish this. Adding space between the edge of a worksheet and cells, or perhaps between a label and the data to which it refers, makes the workbook's contents less crowded and easier to work with. You insert rows by clicking a cell and clicking the Home tab. Then, in the Cells group, click the Insert arrow, and then in the list, click Insert Sheet Rows. Excel 2007 inserts a row above the row that contains the

active cell. You insert a column in much the same way by choosing Insert Sheet Columns from the Insert button's drop-down list. When you do this, Excel 2007 inserts a column to the left of the active cell.

When you insert a row, column, or cell in a worksheet with existing formatting, the Insert Options button appears. Clicking the Insert Options button displays a list of choices you can make about how the inserted row or column should be formatted. The following table summarizes your options.

Option	Action
Format Same As Above	Applies the format of the row above the inserted row to the new row
Format Same As Below	Applies the format of the row below the inserted row to the new row
Format Same As Left	Applies the format of the column to the left of the inserted column to the new column
Format Same As Right	Applies the format of the column to the right of the inserted column to the new column
Clear Formatting	Applies the default format to the new row or column

If you want to delete a row or column, right-click the row or column head and then, from the shortcut menu that appears, click Delete. You can temporarily hide a number of rows or columns by selecting those rows or columns and then, on the Home tab, in the Cells group, clicking the Format button, pointing to Hide & Unhide, and then clicking either Hide Rows or Hide Columns. The rows or columns you selected disappear, but they aren't gone for good, as they would be if you'd used Delete. Instead, they have just been removed from the display until you call them back. To return the hidden rows to the display, on the Home tab, in the Cells group, click the Format button, point to Hide & Unhide, and then click either Unhide Rows or Unhide Columns.

Likewise, you can insert individual cells into a worksheet. To insert a cell, click the cell that is currently in the position where you want the new cell to appear. On the Home tab, in the Cells group, click the Insert arrow, and then in the list, click Insert Cells to display the Insert dialog box. In the Insert dialog box, you can choose whether to shift the cells surrounding the inserted cell down (if your data is arranged as a column) or to the right (if your data is arranged as a row). When you click OK, the new cell appears, and the contents of affected cells shift down or to the right, as appropriate. In a similar vein, if you want to delete a block of cells, select the cells, and on the Home tab, in the Cells group, click the Delete arrow, and then in the list, click Delete Cells to display the Delete dialog box—complete with options that enable you to choose how to shift the position of the cells around the deleted cells.

> **Tip** The Insert dialog box also includes options you can click to insert a new row or column; the Delete dialog box has similar options for deleting an entire row or column.

If you want to move the data in a group of cells to another location in your worksheet, select the cells you want to move and position the mouse pointer on the selection's border. When the mouse pointer changes to a four-way arrow, you can drag the selected cells to the desired location on the worksheet. If the destination cells contain data, Excel 2007 displays a dialog box asking if you want to overwrite the destination cells' contents. If you want to replace the existing values, click the OK button. If you don't want to overwrite the existing values, click the Cancel button and insert the required number of cells to accommodate the data you want to move.

In this exercise, you will insert a column and row into a worksheet, specify insert options, hide a column, insert a cell into a worksheet, delete a cell from a worksheet, and move a group of cells within the worksheet.

> **USE** the *Route Volume* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelCreating* folder.
>
> **OPEN** the *Route Volume* workbook.

1. On the **May 12** worksheet, select cell A1.

2. On the **Home** tab, in the **Cells** group, click the **Insert** arrow, and then in the list, click **Insert Sheet Columns**.

   A new column A appears.

3. In the **Insert** list, click **Insert Sheet Rows**.

   A new row 1 appears.

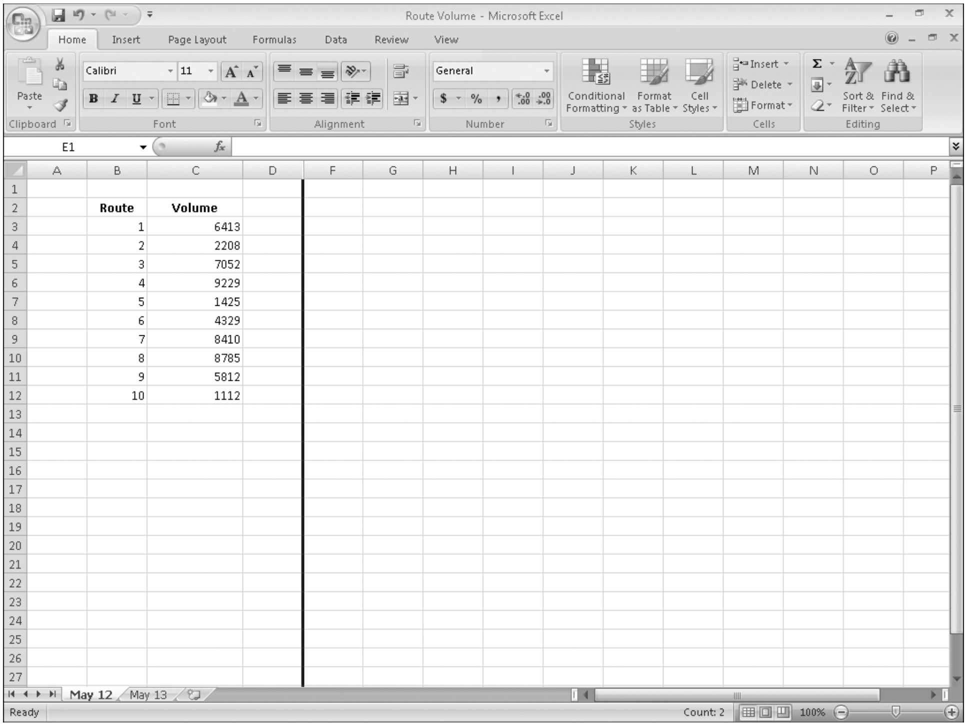

Insert Options

4. Click the **Insert Options** button, and then click **Clear Formatting**.

   Excel 2007 removes the formatting from the new row 1.

5. Right-click the column header of column E, and then click **Hide**.

   Column E disappears.



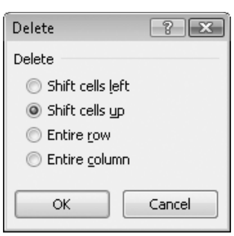
6. On the tab bar, click the **May 13** sheet tab.

   The worksheet named *May 13* appears.

7. Click cell **B6**.

8. On the **Home** tab, in the **Cells** group, click the **Delete** arrow, and then in the list, click **Delete Cells**.

   The Delete dialog box opens.



9. If necessary, click **Shift cells up**, and then click **OK**.

   The Delete dialog box closes and Excel 2007 deletes cell B6, moving the cells below it up to fill in the gap.

10. Click cell **C6**.

11. In the **Insert** list, click **Insert Cells**.

The Insert dialog box opens.

12. If necessary, click **Shift cells down**, and then click **OK**.

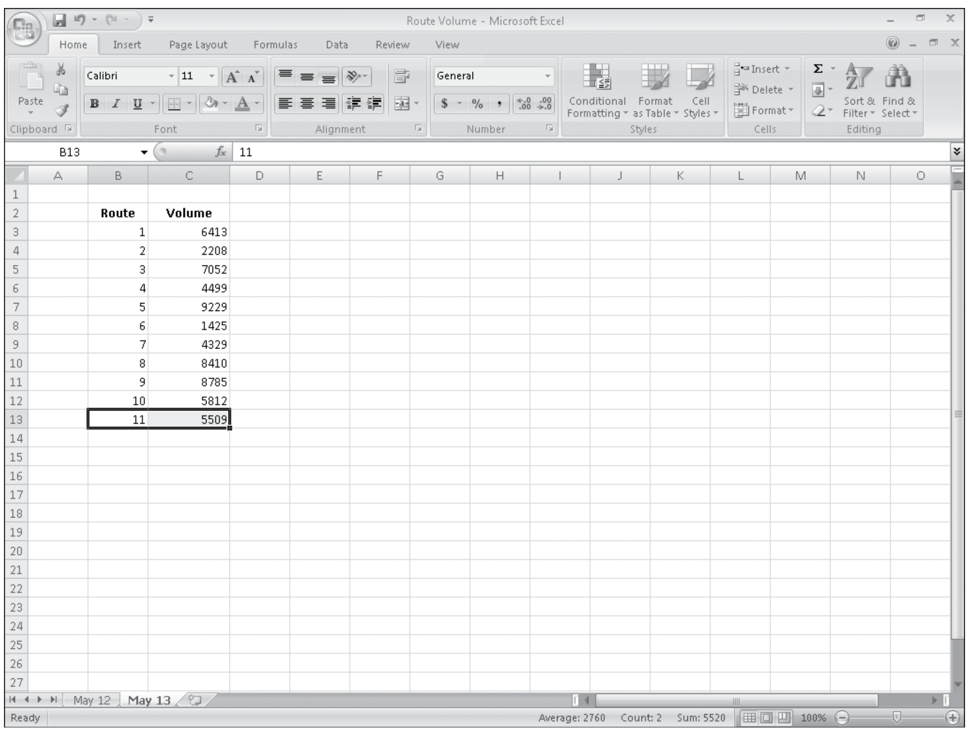
The Insert dialog box closes, and Excel 2007 creates a new cell C6, moving cells C6:C11 down to accommodate the inserted cell.

13. In cell C6, type 4499, and then press Enter.

14. Select cells **E13:F13**.

15. Point to the border of the selected cells. When your mouse pointer changes to a four-pointed arrow, drag the selected cells to cells **B13:C13**.

The dragged cells replace cells C13:D13.



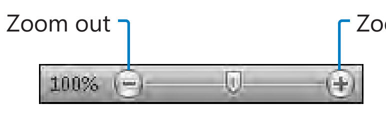
CLOSE the *Route Volume* workbook.

Customizing the Excel 2007 Program Window

How you use Excel 2007 depends on your personal working style and the type of data collections you manage. The Excel 2007 product team interviews customers, observes how differing organizations use the program, and sets up the user interface so that you don't need to change it to work effectively. If you do find yourself wishing that you could change the Excel 2007 program window, including the user interface, you can. You can change how Excel 2007 displays your worksheets, zoom in on worksheet data, and add frequently used commands to the Quick Access Toolbar.

Zooming In on a Worksheet

One way to make Excel 2007 easier to work with is to change the program's zoom level. Just as you can "zoom in" with a camera to increase the size of an object in the camera's viewer, you can use the Excel 2007 zoom setting to change the size of objects within the Excel 2007 program window. For example, if Peter Villadsen, the Consolidated Messenger European Distribution Center Manager, displayed a worksheet that summarized his distribution center's package volume by month, he could click the View tab and then, in the Zoom group, click the Zoom button to display the Zoom dialog box. The Zoom dialog box contains controls that enable him to select a preset magnification level or to type in a custom magnification level. He could also use the Zoom control at the lower-right corner of the Excel 2007 window.



Clicking the Zoom In control increases the size of items in the program window by 10 percent, whereas clicking the Zoom Out control decreases the size of items in the program window by 10 percent. If you want more fine-grained control of your zoom level, you can use the slider control to select a specific zoom level.

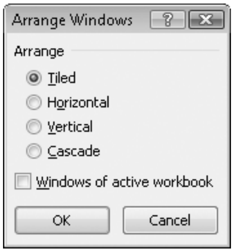
The View tab's Zoom group also contains the Zoom To Selection button, which fills the program window with the contents of any selected cells, up to the program's maximum zoom level of 400 percent.

Tip The mimimum zoom level in Excel 2007 is 10 percent.

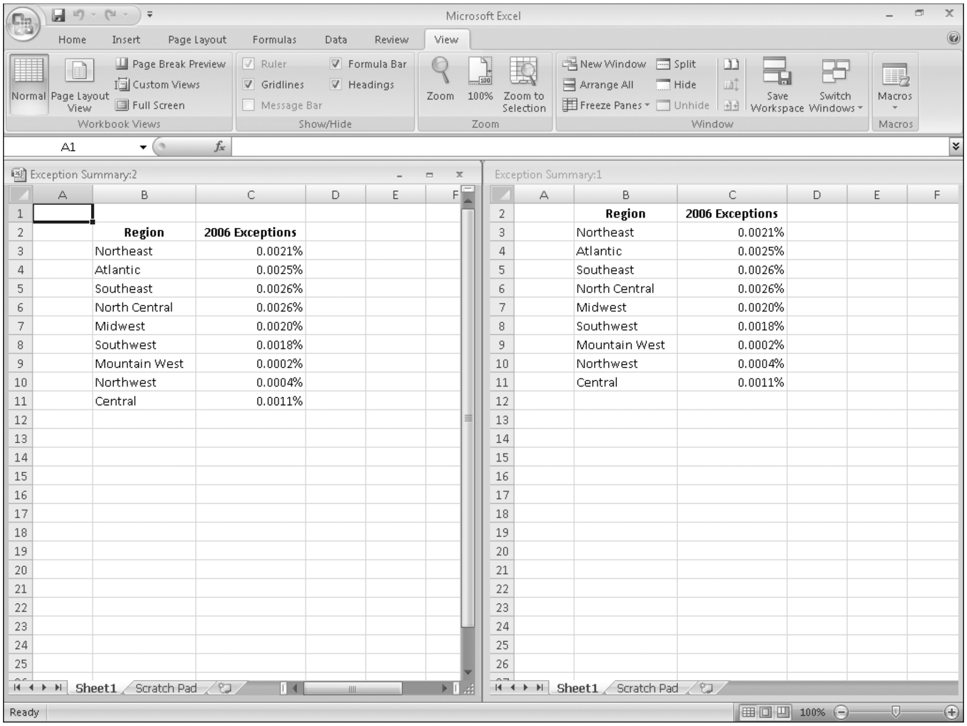
Arranging Multiple Workbook Windows

As you work with Excel 2007, you will probably need to have more than one workbook open at a time. For example, you could open a workbook that contains customer contact information and copy it into another workbook to be used as the source data for a mass mailing you create in Microsoft Office Word 2007. When you have multiple workbooks open simultaneously, you can switch between them by clicking the View tab and then, in the Window group, clicking the Switch Windows button and clicking the name of the workbook you want to view.

You can arrange your workbooks within the Excel 2007 window so that most of the active workbook is shown, but the others are easily accessible by clicking the View tab and then, in the Window group, clicking the Arrange All button. Then, in the Arrange Windows dialog box, click Cascade.



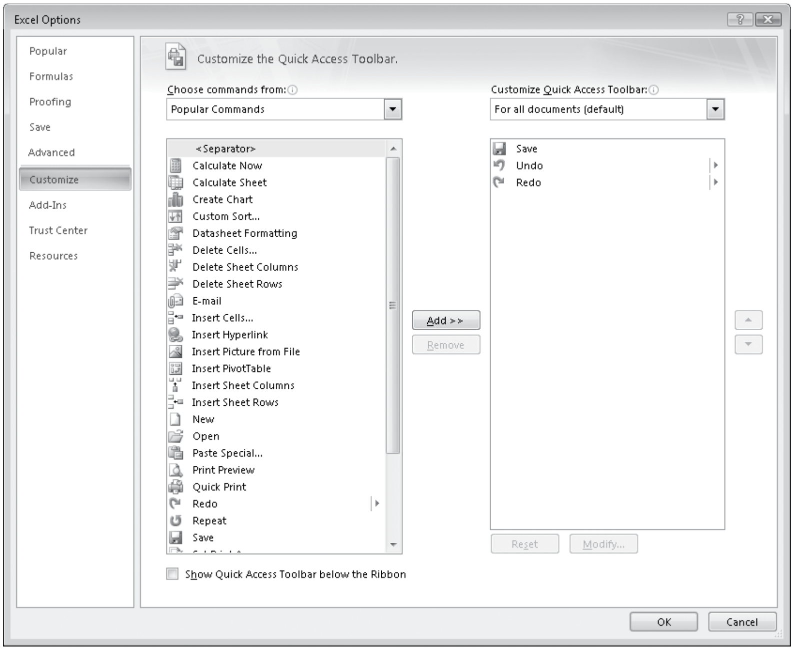
Many Excel 2007 workbooks contain formulas on one worksheet that derive their value from data on another worksheet, which means you need to change between two worksheets every time you want to see how modifying your data changes the formula's result. However, you can display two copies of the same workbook, displaying the worksheet that contains the data in the original window and displaying the worksheet with the formula in the new window. When you change the data in the original copy of the workbook, Excel 2007 updates the formula result in a new window. To display two copies of the same workbook, open the desired workbook and then, on the View tab's Window group, click New Window. Excel 2007 will open a second copy of the workbook. If the original workbook's name was *Exception Summary*, Excel 2007 displays the name *Exception Summary:1* on the original workbook's title bar and *Exception Summary:2* on the second workbook's title bar.



Adding Buttons to the Quick Access Toolbar

As you continue to work with Excel 2007, you might discover that you use certain commands much more frequently than others. If your workbooks draw data from external sources, you might find yourself displaying the Data tab and then, in the Connections group, clicking the Refresh All button much more often than the program's designers might have expected. You can make any button accessible with one click by adding the button to the Quick Access Toolbar, located just to the right of the Microsoft Office Button at the upper-left corner of the Excel 2007 program window.

To add a button to the Quick Access Toolbar, click the Microsoft Office Button, and click Excel Options. In the Excel Options dialog box, click the Customize name, and then in the Choose Commands From list, click the category from which you want to select the control to add. Excel 2007 displays the available commands in the list box below the Choose Commands From field. Click the control you want, and then click the Add button. You can change a button's position on the Quick Access Toolbar by clicking its name in the lower-right pane and then clicking either the Move Up or Move Down button. To remove a button from the Quick Access Toolbar, click the button's name, and then click the Remove button. When you're done making your changes, click the OK button.



You can also choose whether your Quick Access Toolbar change affects all your workbooks or just the active workbook. To control how Excel 2007 applies your change, in the Customize Quick Access Toolbar list, click either For All Documents to apply the change to all of your workbooks or For Workbook to apply the change to the active workbook only.

In this exercise, you will change your worksheet's zoom level, zoom in to emphasize a selected cell range, switch between multiple open workbooks, cascade multiple open workbooks within the Excel 2007 program window, and add a button to the Quick Access Toolbar.

USE the *Route Volume* and *Exception Summary* workbooks. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelCreating* folder.

OPEN the *Route Volume* workbook and the *Exception Summary* workbook.

1. In the *Exception Summary* workbook, display the **2006** worksheet.


Zoom In

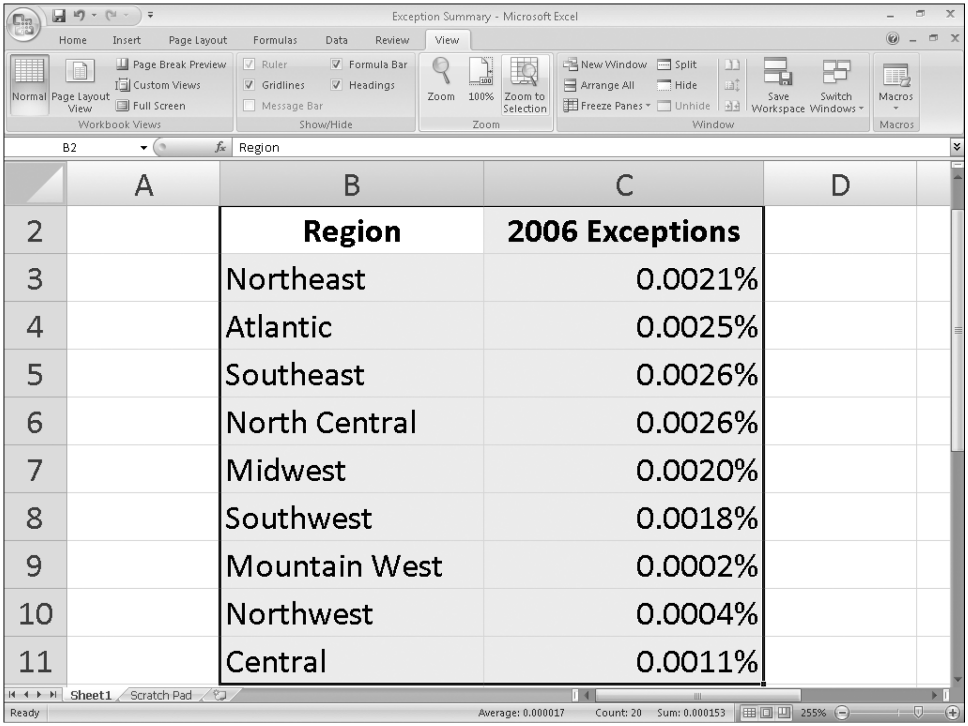
2. In the lower-right corner of the Excel 2007 window, click the **Zoom In** control five times.

   The worksheet's zoom level changes to 150%.

3. Select cells **B2:C11**.

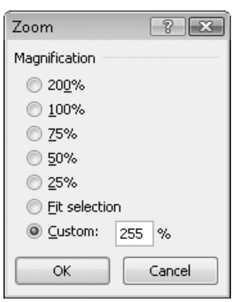
4. On the **View** tab, in the **Zoom** group, click the **Zoom to Selection** button.

   Excel 2007 displays the selected cells so they fill the program window.



5. On the **View** tab, in the **Zoom** group, click the **Zoom** button.

   The Zoom dialog box opens.



6. Click **100%**, and then click **OK**.

   The worksheet returns to its default zoom level.

7. On the **View** tab, in the **Window** group, click the **Switch Windows** button, and then click **Route Volume**.

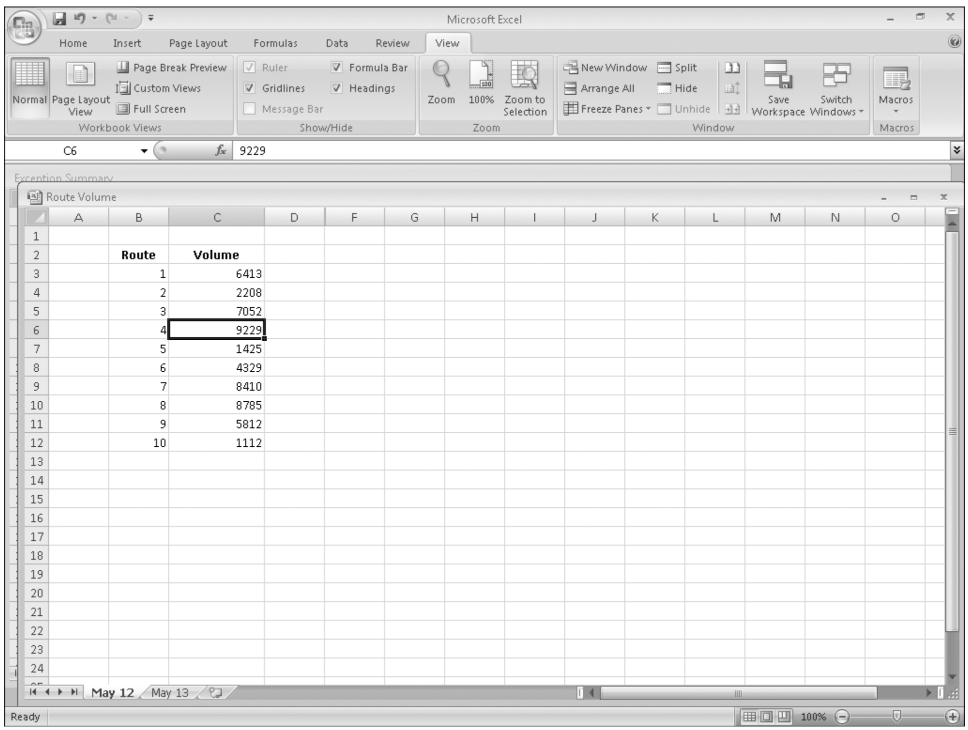
   The *Route Volume* workbook appears.

8. On the **View** tab, in the **Window** group, click the **Arrange All** button.

   The Arrange Windows dialog box opens.

9. Click **Cascade**, and then click **OK**.

   Excel 2007 cascades the open workbook windows within the Excel 2007 program window.



10. Click the **Microsoft Office Button**, and then click **Excel Options**.

    The Excel Options dialog box opens.

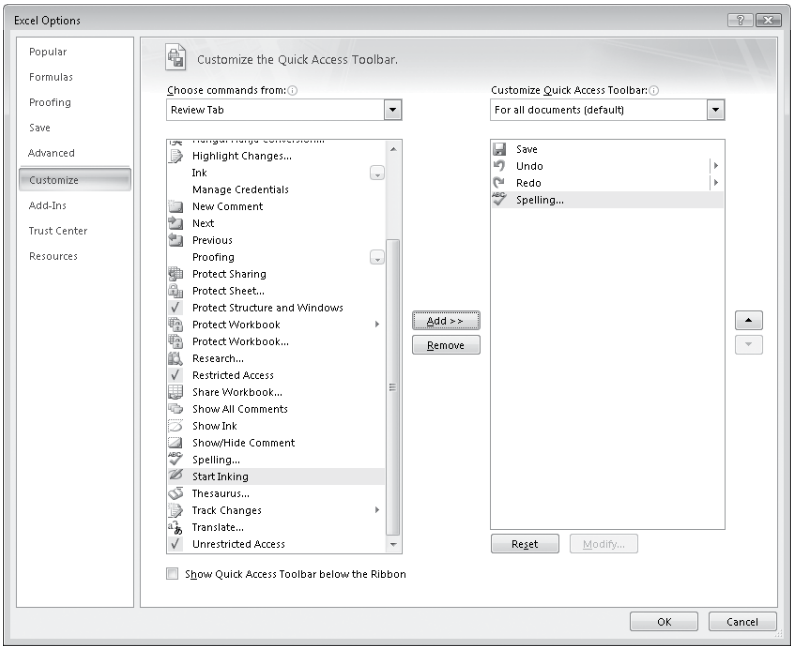
11. Click **Customize**.

    The Customize tab appears.

12. Click the **Choose commands from** arrow, and then in the list, click **Review Tab**.

    The commands in the Review Tab category appear in the command list.

13. Click the **Spelling** command, and then click **Add**.



14. Click **OK**.

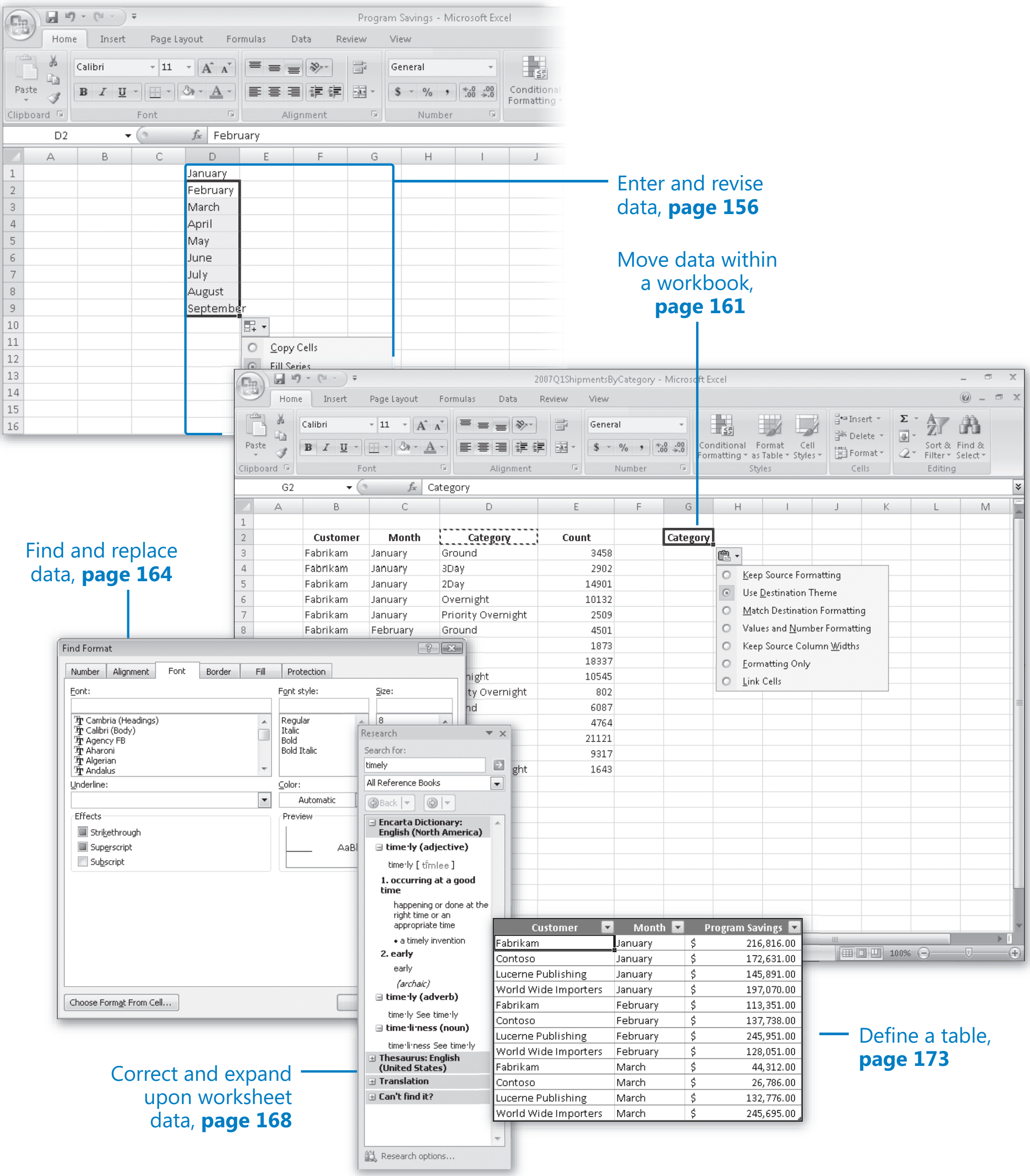
    Excel 2007 adds the Spelling command to the Quick Access Toolbar.

CLOSE all open workbooks. If you are not continuing directly to the next chapter, exit Excel.

Key Points

- Save your work whenever you do something you'd hate to have to do again.
- Assigning values to a workbook's properties makes it easier to find your workbook using the Windows search facility.
- Be sure to give your worksheets descriptive names.
- If you want to use a worksheet's data in another workbook, you can send a copy of the worksheet to that other workbook without deleting the original worksheet.
- You can delete a worksheet you no longer need, but you can also hide a worksheet in the workbook. When you need the data on the worksheet, you can unhide it.
- You can save yourself a lot of bothersome cutting and pasting by inserting and deleting worksheet cells, columns, and rows.
- Customize your Excel 2007 program window by changing how it displays your workbooks, zooming in on data, and adding frequently used buttons to the Quick Access Toolbar.

Chapter at a Glance



6 Working with Data and Data Tables

In this chapter, you will learn to:

- ✔ Enter and revise data.
- ✔ Move data within a workbook.
- ✔ Find and replace data.
- ✔ Correct and expand upon worksheet data.
- ✔ Define a table.

Microsoft Office Excel 2007 enables you to visualize and present information effectively using charts, graphics, and formatting, but the data is the most important part of any workbook. By learning to enter data efficiently, you will make fewer data entry errors and give yourself more time to analyze your data so you can make decisions about your organization's performance and direction.

Excel 2007 provides a wide variety of tools you can use to enter and manage worksheet data effectively. For example, Excel 2007 enables you to organize your data into tables, which enables you to analyze and store your data quickly and easily. Excel 2007 also enables you to enter a data series quickly; repeat one or more values; or control how Excel 2007 formats cells, columns, and rows moved from one part of a worksheet to another. And you can do so with a minimum of effort. Excel 2007 also enables you to check the spelling of worksheet text, look up alternative words by using the Thesaurus, and translate words to foreign languages.

In this chapter, you will learn how to enter and revise Excel 2007 data, move data within a workbook, find and replace existing data, use proofing and reference tools to enhance your data, and organize your data by using Excel 2007 data tables.

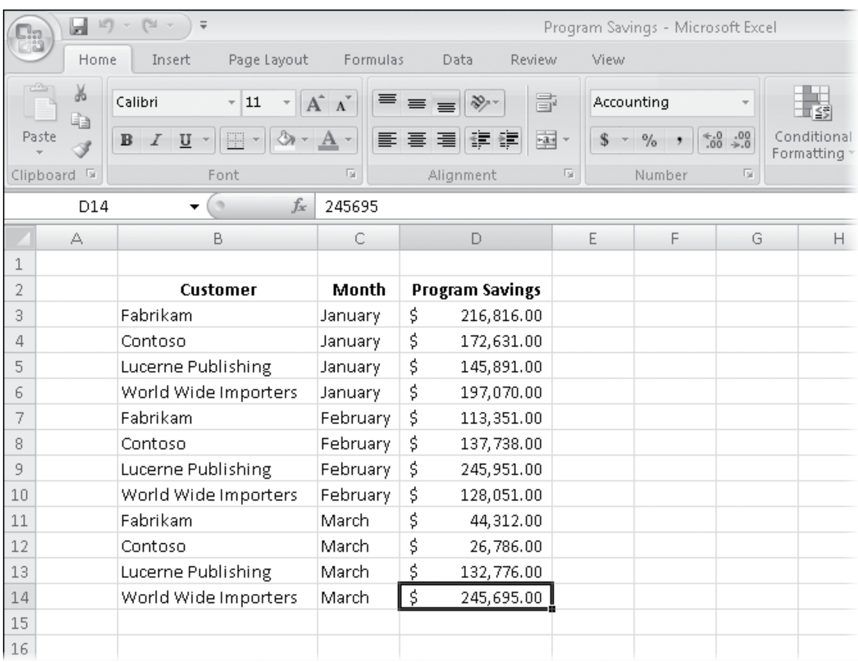
See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice sites in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Entering and Revising Data

After you create a workbook, you can begin entering data. The simplest way to enter data is to click a cell and type a value, which is a method that works very well when you're entering a few pieces of data, but it is less than ideal when you're entering long sequences or series of values. For example, Craig Dewar, the VP of Marketing for Consolidated Messenger, might want to create a worksheet listing the monthly program savings that large customers can enjoy if they sign exclusive delivery contracts with Consolidated Messenger. To record those numbers, he would need to create a worksheet with the following layout.



Repeatedly entering the sequence January, February, March, and so on can be handled by copying and pasting the first occurrence of the sequence, but there's an easier way to do it: use ***AutoFill***. With AutoFill, you enter the first element in a recognized series, grab the ***fill handle*** at the lower-right corner of the cell, and drag the fill handle until the series extends far enough to accommodate your data. A similar tool, ***FillSeries***, enables you to enter two values in a series and use the fill handle to extend the series in your worksheet. For example, if you want to create a series starting at 2 and increasing by 2, you can put 2 in the first cell and 4 in the second cell, select both cells, and then use the fill handle to extend the series to your desired end value.

You do have some control over how Excel 2007 extends the values in a series when you drag the fill handle. For example, if you drag the fill handle up (or to the left), Excel 2007 extends the series to include previous values. If you type *January* in a cell and then drag that cell's fill handle up (or to the left), Excel 2007 places *December* in the first cell, *November* in the second cell, and so on.

Another way to control how Excel 2007 extends a data series is by holding down the Ctrl key while you drag the fill handle. For example, if you select a cell that contains the value *January* and then drag the fill handle down, Excel 2007 extends the series by placing *February* in the next cell, *March* in the cell after that, and so on. If you hold down the Ctrl key, however, Excel 2007 repeats the value *January* in each cell you add to the series.

> **Tip** Be sure to experiment with how the fill handle extends your series and how pressing the Ctrl key changes that behavior. Using the fill handle can save you a lot of time entering data.

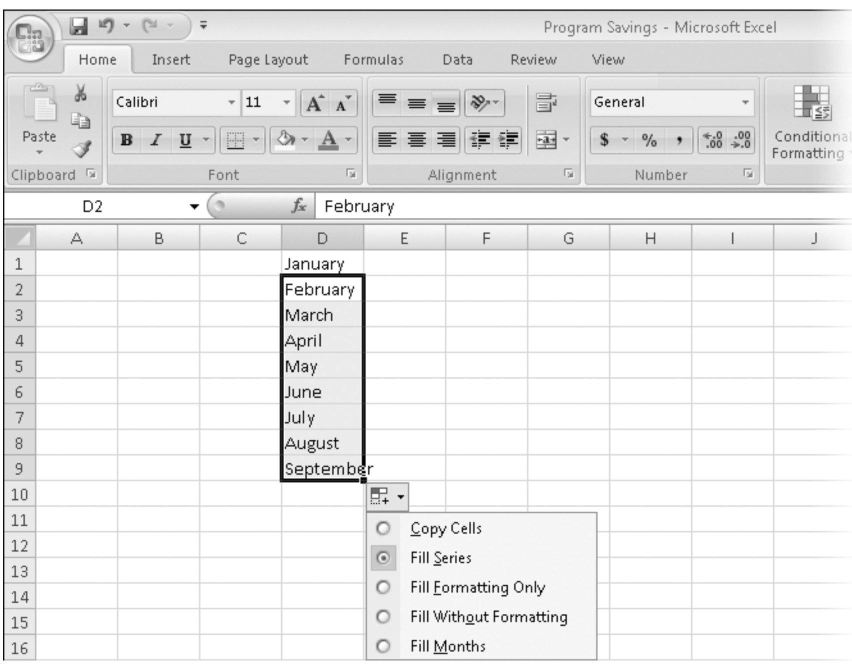
Other data entry techniques you'll use in this section are ***AutoComplete***, which detects when a value you're entering is similar to previously entered values; ***Pick From Drop-down List***, which enables you to choose a value from existing values in a column; and Ctrl+Enter, which enables you to enter a value in multiple cells simultaneously.

> **Troubleshooting** If an AutoComplete suggestion doesn't appear as you begin typing a cell value, the option might be turned off. To turn on AutoComplete, click the Microsoft Office Button, and then click Excel Options. In the Excel Options dialog box, click the Advanced category. In the Editing Options section of the dialog box, select the Enable AutoComplete For Cell Values check box, and then click OK.

The following table summarizes these data entry techniques.

Method	Action
AutoFill	Enter the first value in a recognized series and use the fill handle to extend the series.
FillSeries	Enter the first two values in a series and use the fill handle to extend the series.
AutoComplete	Type the first few letters in a cell, and if a similar value exists in the same column, Excel 2007 suggests the existing value.
Pick From Drop-down List	Right-click a cell, and from the shortcut menu that appears, choose Pick From Drop-down List. A list of existing values in the cell's column appears. Click the value you want to enter into the cell.
Ctrl+Enter	Select a range of cells to contain the same data, type the data in the active cell, and press Ctrl+Enter.

Another handy feature in the current version of Excel 2007 is the Auto Fill Options button that appears next to data you add to a worksheet by using AutoFill.



Clicking the Auto Fill Options button displays a list of actions Excel 2007 can take regarding the cells affected by your fill operation. The options in the list are summarized in the following table.

Option	Action
Copy Cells	Copies the contents of the selected cells to the cells indicated by the Fill operation
Fill Series	Fills the cells indicated by the Fill operation with the next items in the series
Fill Formatting Only	Copies the format of the selected cell to the cells indicated by the Fill operation, but does not place any values in the target cells
Fill Without Formatting	Fills the cells indicated by the Fill operation with the next items in the series, but ignores any formatting applied to the source cells
Fill Days, Weekdays, and so on	Changes according to the series you extend. For example, if you extend the cells *Wed*, *Thu*, and *Fri*, Excel 2007 presents two options, Fill Days and Fill Weekdays, and enables you to select which one you intended. If you do not use a recognized sequence, the option does not appear

In this exercise, you will enter data by multiple methods, and control how Excel 2007 formats an extended data series.

USE the *Series* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelData* folder.

BE SURE TO start Excel 2007 before beginning this exercise.

OPEN the *Series* workbook.

1. On the **Monthly** worksheet, select cell **B3**, and then drag the fill handle down until it covers cells B3:B7.

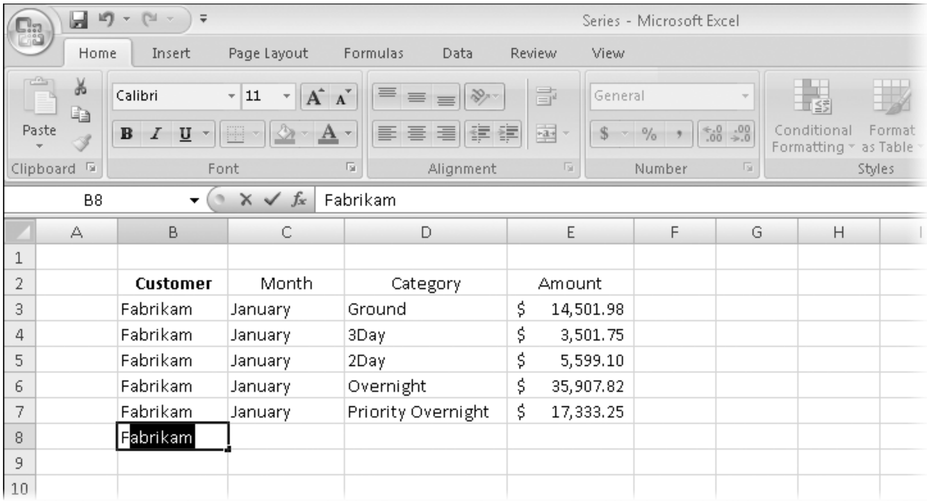
   Excel 2007 repeats the value *Fabrikam* in cells B4:B7.

2. Select cell **C3**, hold down the Ctrl key, and drag the fill handle down until it covers cells C3:C7.

   Excel 2007 repeats the value *January* in cells C4:C7.

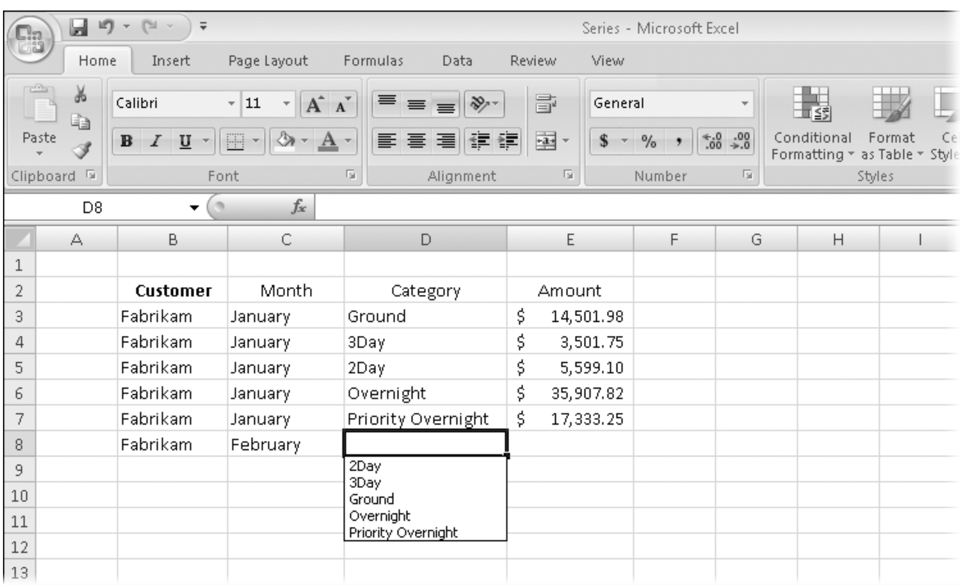
3. Select cell **B8**, and then type the letter F.

   Excel 2007 displays the characters *abrikam* in reverse video.



4. Press Tab to accept the value *Fabrikam* for the cell.
5. In cell **C8**, type **February**.
6. Right-click cell **D8**, and then click **Pick From Drop-down List**.

   A list of values in column D appears below cell D8.



7. From the list that appeared, click **2Day**.

   The value *2Day* appears in cell D8.

8. In cell E8, type 11802.14.

   The value *$11,802.14* appears in cell E8.

9. Select cell **B2**, and then drag the fill handle so that it covers cells C2:E2.

   Excel 2007 replaces the values in cells C2:E2 with the value *Customer*.

10. Click the **Auto Fill Options** button, and then click **Fill Formatting Only**.

    Excel 2007 restores the original values in cells C2:E2 but applies the formatting of cell B2 to those cells.

CLOSE the *Series* workbook.

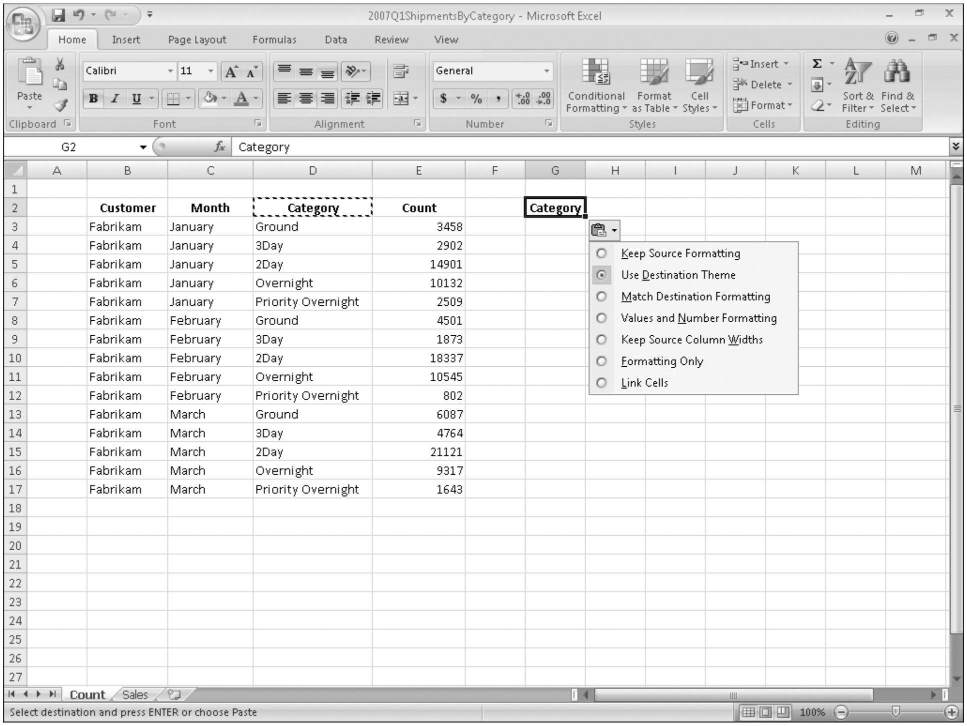
Moving Data Within a Workbook

You can move to a specific cell in lots of ways, but the most direct method is to click the cell to which you want to move. The cell you click will be outlined in black, and its contents, if any, will appear in the formula bar. When a cell is outlined, it is the ***active cell***, meaning that you can modify its contents. You use a similar method to select multiple cells (referred to as a ***cell range***)—just click the first cell in the range and drag the mouse pointer over the remaining cells you want to select. After you select the cell or cells you want to work with, you can cut, copy, delete, or change the format of the contents of the cell or cells. For instance, Gregory Weber, the Northwestern Distribution Center Manager, might want to copy the cells that contain a set of column labels to a new page that summarizes similar data.

Important If you select a group of cells, the first cell you click is designated the active cell.

You're not limited to selecting cells individually or as part of a range. For example, you might need to move a column of price data one column to the right to make room for a column of headings that indicate to which service category (ground, three-day express, two-day express, overnight, or priority overnight) a set of numbers belongs. To move an entire column (or entire columns) of data at a time, you click the column's header, located at the top of the worksheet. Clicking a column header highlights every cell in that column and enables you to copy or cut the column and paste it elsewhere in the workbook.

The Paste Options button appears next to data you copy from a cell and paste into another cell. Clicking the Paste Options button displays a list of actions that Excel 2007 can take regarding the pasted cells.



The options in the list are summarized in the following table.

Option	Action
Use Destination Theme	Pastes the contents of the Clipboard (which holds the last information selected via Cut or Copy) into the target cells and formats the data using the theme applied to the target workbook
Match Destination Formatting	Pastes the contents of the Clipboard into the target cells and formats the data using the existing format in the target cells, regardless of the workbook's theme
Keep Source Formatting	Pastes a column of cells into the target column; applies the format of the copied column to the new column
Values Only	Pastes the values from the copied column into the destination column without applying any formatting
Values And Number Formatting	Pastes the contents of the Clipboard into the target cells, keeping any numeric formats

Option	Action
Values And Source Formatting	Pastes the contents of the Clipboard into the target cells, retaining all the source cells' formatting
Keep Source Column Widths	Pastes the contents of the Clipboard into the target cells and resizes the columns of the target cells to match the widths of the columns of the source cells
Formatting Only	Applies the format of the source cells to the target cells, but does not copy the contents of the source cells

Troubleshooting If the Paste Options button doesn't appear, you can turn the feature on by clicking the Microsoft Office Button and then clicking Excel Options to display the Excel Options dialog box. In the Excel Options dialog box, click the Advanced category and then, in the Cut, copy, and paste section, select the Show Paste Options buttons check box. Click OK to close the dialog box and save your setting.

In this exercise, you will copy a set of column headers to another worksheet, move a column of data within a worksheet, and select paste options for copied data.

USE the *2007Q1ShipmentsByCategory* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelData* folder.

OPEN the *2007Q1ShipmentsByCategory* workbook.

1. On the **Count** worksheet, select cells **B2:D2**.

Copy

2. On the **Home** tab, in the **Clipboard** group, click the **Copy** button.

   Excel 2007 copies the contents of cells B2:D2 to the Clipboard.
3. Create a worksheet named Sales, and display it.
4. Select cell **B2**.

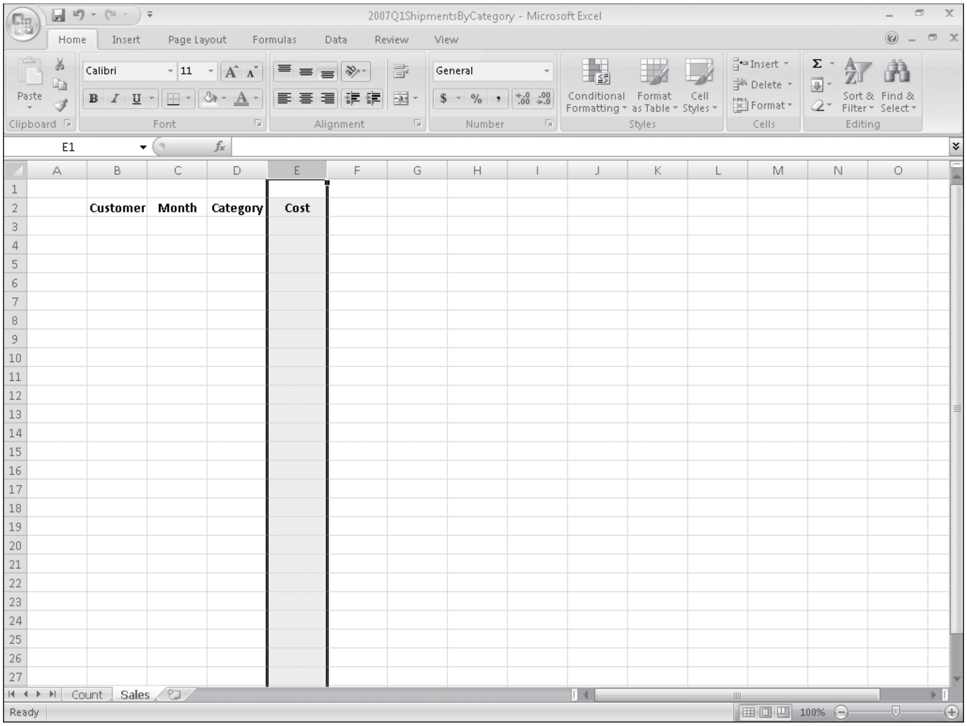
5. On the **Home** tab, in the **Clipboard** group, click **Paste**.

   Excel 2007 pastes the header values into cells B2:D2.
6. Click the **Paste Options** smart tag, and then click **Keep Source Formatting**.

   Excel 2007 retains the cells' original formatting.
7. Right-click the column header of column I, and then click **Cut**.

   Excel 2007 outlines column I with a marquee.
8. Right-click the header of column E, and then click **Paste**.

Excel 2007 pastes the contents of column I into column E.

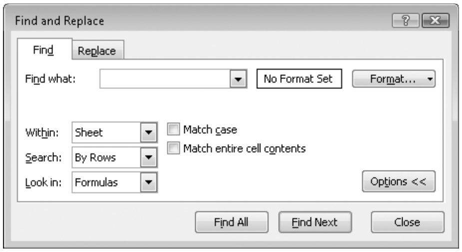


CLOSE the *2007Q1ShipmentsByCategory* workbook.

Finding and Replacing Data

Excel 2007 worksheets can contain more than one million rows of data, so it's unlikely that you would have the time to move through a worksheet a row at a time to locate the data you want to find. You can locate specific data on an Excel 2007 worksheet by using the Find And Replace dialog box, which has two tabs (one named Find; the other named Replace) that enable you to search for cells that contain particular values. Using the controls on the Find tab finds the data you specify; using the controls on the Replace tab enables you to substitute one value for another. As an example, one of Consolidated Messenger's customers might change the company name. If that's the case, you can change every instance of the old name to the new name.

When you need more control over the data that you find and replace, such as if you want to find cells in which the entire cell value matches the value you're searching for, you can click the Options button to expand the Find And Replace dialog box.



One way you can use the extra options in the Find And Replace dialog box is to identify data that requires review using a specific format. As an example, Consolidated Messenger VP of Marketing Craig Dewar could make corporate sales plans based on a projected budget for the next year. After the executive board finalizes the numbers, he could use Find Format in the Find And Replace dialog box to locate the old prices and then change them by hand.

To change a value by hand, select the cell and then either type a new value in the cell or, on the Formula Bar, select the value you want to replace and type the new value.

The following table summarizes the Find And Replace dialog box controls' functions.

Control	**Function**
Find What field	Contains the value you want to find or replace
Find All button	Selects every cell that contains the value in the Find What field
Find Next button	Selects the next cell that contains the value in the Find What field
Replace With field	Contains the value to overwrite the value in the Find What field
Replace All button	Replaces every instance of the value in the Find What field with the value in the Replace With field
Replace button	Replaces the next occurrence of the value in the Find What field and highlights the next cell that contains that value
Options button	Expands the Find And Replace dialog box to display additional capabilities
Format button	Displays the Find Format dialog box, which you can use to specify the format of values to be found or to replace found values
Within list box	Enables you to select whether to search the active worksheet or the entire workbook
Search list box	Enables you to select whether to search by rows or by columns
Look In list box	Enables you to select whether to search cell formulas or values
Match Case check box	When checked, requires that all matches have the same capitalization as the text in the Find What field (for example, cat doesn't match Cat)
Match Entire Cell Contents check box	Requires that the cell contain exactly the same value as in the Find What field (for example, Cat doesn't match Catherine)
Close button	Closes the Find And Replace dialog box

In this exercise, you will find a specific value in a worksheet, replace every occurrence of a company name in a worksheet, and find a cell with a particular formatting.

USE the *Average Deliveries* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelData* folder.

OPEN the *Average Deliveries* workbook.

1. If necessary, click the **Time Summary** sheet tab.

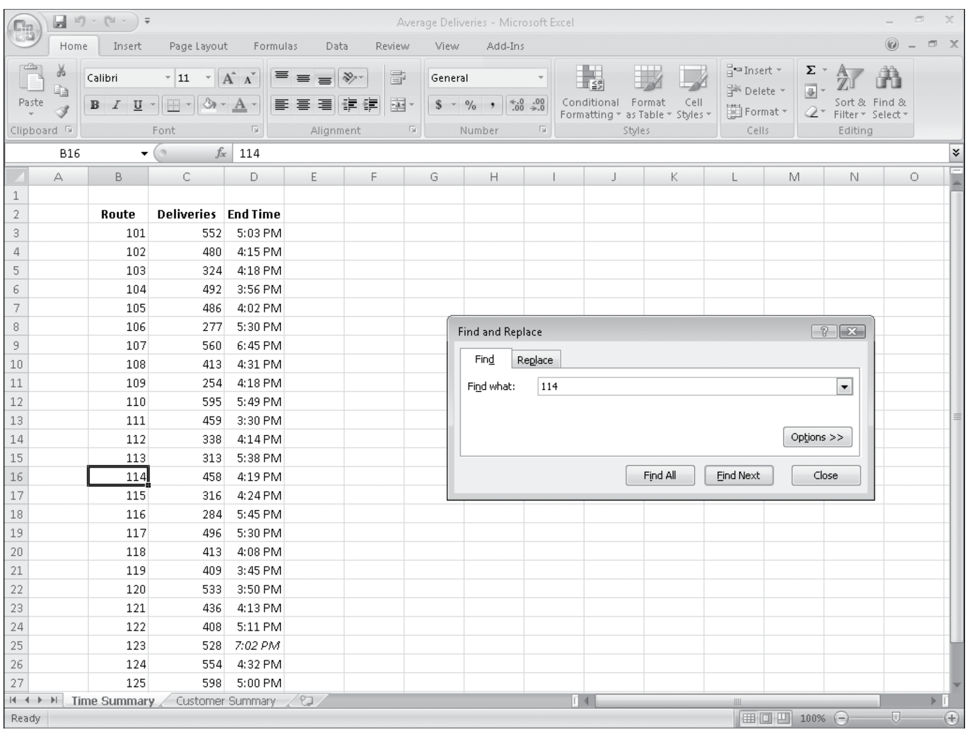
   The Time Summary worksheet appears.

2. On the **Home** tab, in the **Editing** group, click **Find & Select**, and then click **Find**.

   The Find And Replace dialog box opens with the Find tab displayed.

3. In the **Find what** field, type 114.
4. Click **Find Next**.

   Excel 2007 highlights cell B16, which contains the value *114*.



5. Delete the value in the **Find what** field, and then click the **Options** button.

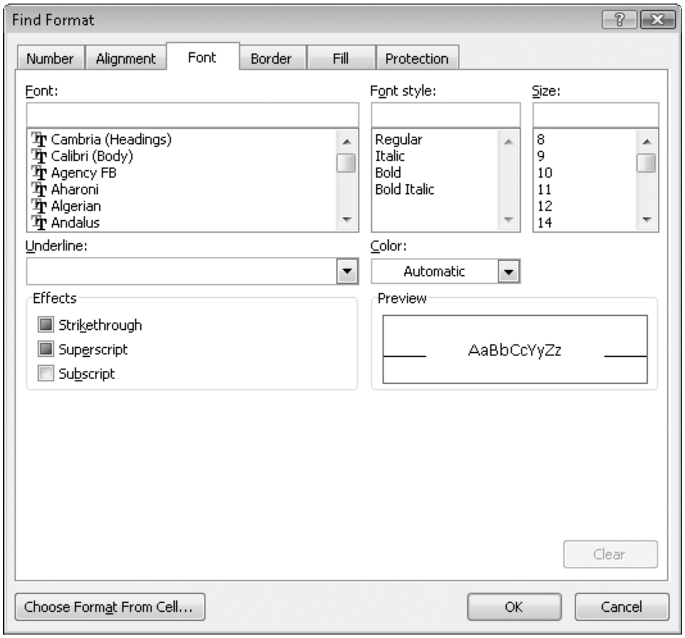
   The Find And Replace dialog box expands to display additional search options.

6. Click **Format**.

   The Find Format dialog box opens.

7. Click the **Font** tab.

   The Font tab appears.



8. In the **Font style** list, click **Italic**.

9. Click **OK**.

   The Find Format dialog box closes.

10. Click **Find Next**.

    Excel 2007 highlights cell D25.

11. Click **Close**.

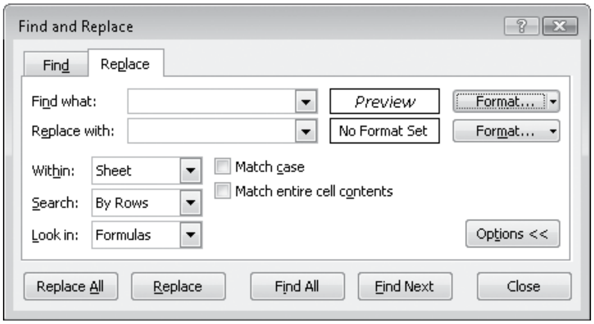
    The Find And Replace dialog box closes.

12. On the tab bar, click the **Customer Summary** sheet tab.

    The Customer Summary worksheet appears.

13. On the **Home** tab, in the **Editing** group, click **Find & Select**, and then click **Replace**.

    The Find And Replace dialog box opens with the Replace tab displayed.



14. Click the **Format** arrow to the right of the **Find what** field, and then in the list, click **Clear Find Format**.

    The format displayed next to the Find What field disappears.

15. In the **Find what** field, type Contoso.
16. In the **Replace with** field, type Northwind Traders.
17. Click **Replace All**.
18. Click **OK** to clear the message box that appears, indicating that Excel 2007 made three replacements.
19. Click **Close**.

    The Find And Replace dialog box closes.

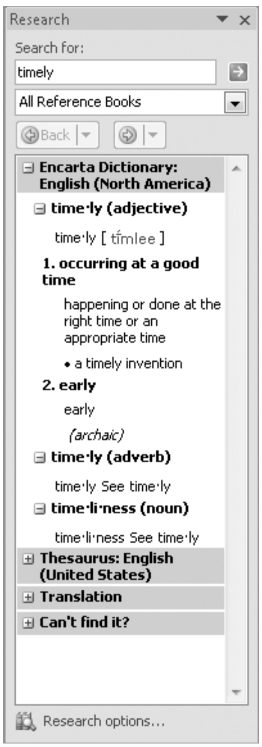
CLOSE the *Average Deliveries* workbook.

Correcting and Expanding Upon Worksheet Data

After you enter your data, you should take the time to check and correct it. You do need to verify visually that each piece of numeric data is correct, but you can make sure that the text is spelled correctly by using the Excel 2007 spelling checker. When the spelling checker encounters a word it doesn't recognize, it highlights the word and offers suggestions representing its best guess of the correct word. You can then edit the word directly, pick the proper word from the list of suggestions, or have the spelling checker ignore the misspelling. You can also use the spelling checker to add new words to a custom

dictionary so that Excel 2007 will recognize them later, saving you time by not requiring you to identify the words as correct every time they occur in your worksheets. After you make a change, you can remove the change as long as you haven't closed the workbook in which you made the change. To undo a change, click the Undo button on the Quick Access Toolbar. If you decide you want to keep a change, you can use the Redo command to restore it.

If you're not sure of your word choice or if you use a word that is almost but not quite right for your meaning, you can check for alternative words by using the Thesaurus. A number of other research tools are also available, such as the Microsoft Encarta encyclopedia, which you can refer to as you create your workbook. To display those tools, on the Review tab, in the Proofing group, click Research to display the Research task pane.



Finally, if you want to translate a word from one language to another, you can do so by selecting the cell that contains the value you want to translate, by displaying the Review tab, and then, in the Proofing group, by clicking Translate. The Research task pane appears (or changes if it's already open) and displays controls you can use to select the original and destination languages.

> **Important** Excel 2007 translates a sentence by using word substitutions, which means that the translation routine doesn't always pick the best word for a given context. The translated sentence might not capture your exact meaning.

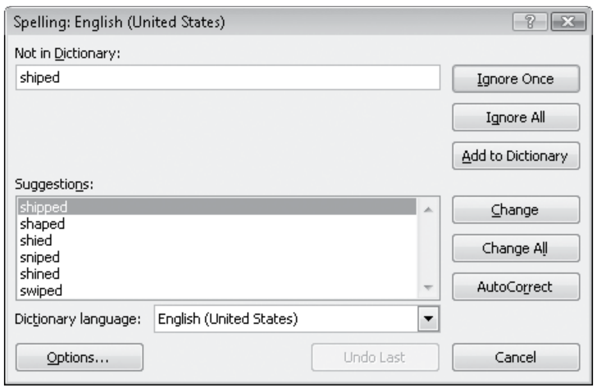
In this exercise, you will check a worksheet's spelling, add two new terms to a dictionary, undo a change, search for an alternative word using the Thesaurus, and translate a word to French.

USE the *Service Levels* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelData* folder.

OPEN the *Service Levels* workbook.

1. On the **Review** tab, in the **Proofing** group, click **Spelling**.

   The Spelling dialog box opens with the misspelled word displayed in the Not In Dictionary field.



2. Verify that the word *shipped* is highlighted in the **Suggestions** pane, and then click **Change**.

   Excel 2007 corrects the word and displays the next questioned word: *withn*.

3. Click **Change**.

   Excel corrects the word and displays the next questioned word: *TwoDay*.

4. Click **Add to Dictionary**.

   Excel 2007 adds the word to the dictionary and displays the next questioned word: *ThreeDay*.

5. Click **Add to Dictionary**.

   Excel 2007 adds the word to the dictionary.

6. Click **Close**.

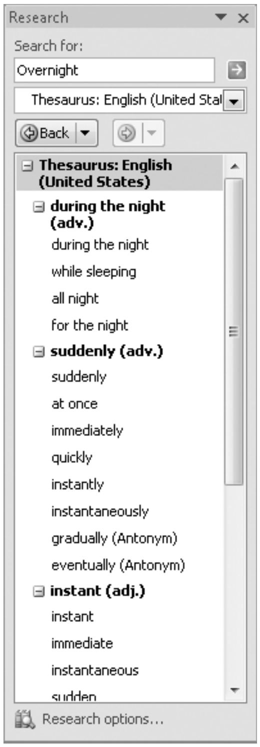
   The Spelling dialog box closes, and a message box appears, indicating that the spell check is complete for the selected items.

7. Click **OK** to close the message box.

8. Click cell **B6**.

9. On the **Review** tab, in the **Proofing** group, click **Thesaurus**.

   The Research task pane appears and displays a list of synonyms and antonyms for the word *Overnight*.



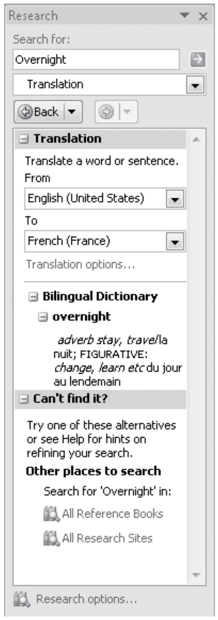
10. On the **Review** tab, in the **Proofing** group, click **Translate**.

    The Research task pane displays the translation tools.

11. If necessary, in the **From** list, click **English (United States).**

12. In the **To** list, click **French (France).**

    The Research task pane displays French words that mean *overnight*.



CLOSE the *Service Levels* workbook.

Defining a Table

Excel has always enabled you to manage lists of data effectively, enabling you to sort your worksheet data based on the values in one or more columns, limit the data displayed by using criteria (for example, show only those routes with fewer than 100 stops), and create formulas that summarize the values in visible (that is, unfiltered) cells. Customer feedback indicated that many Excel 2007 users wanted a more robust structure within Excel 2007 that enabled users to perform those operations and more. Excel 2003 included a structure called a *data list* that has evolved into the *table* in Excel 2007.

Customer	Month	Program Savings
Fabrikam	January	$ 216,816.00
Contoso	January	$ 172,631.00
Lucerne Publishing	January	$ 145,891.00
World Wide Importers	January	$ 197,070.00
Fabrikam	February	$ 113,351.00
Contoso	February	$ 137,738.00
Lucerne Publishing	February	$ 245,951.00
World Wide Importers	February	$ 128,051.00
Fabrikam	March	$ 44,312.00
Contoso	March	$ 26,786.00
Lucerne Publishing	March	$ 132,776.00
World Wide Importers	March	$ 245,695.00

To create a data table, type a series of column headers in adjacent cells and then type a row of data below the headers. Select the headers and data, and on the Home tab, in the Styles group, click Format As Table. Then, from the gallery that appears, click the style you want to apply to the table. When the Format As Table dialog box opens, verify that the cells in the Where Is The Data For Your Table? field reflect your current selection and that the My Table Has Headers check box is selected, and then click OK.

Excel 2007 can also create a table from an existing data list as long as your data has a differently formatted header row, the list has no blank rows or columns within the data, and there is no extraneous data in cells immediately below or next to the list.

When you want to add data to a table, select a cell in the row immediately below the last row in the table or a cell in the column immediately to the right of the table, and then type a value into the cell. After you enter the value and move out of the cell, the AutoCorrect Options smart tag appears. If you didn't mean to include the data in the table, you can click Undo Table AutoExpansion to exclude the cells from the table. If you never want Excel 2007 to include adjacent data in a table, click Stop Automatically Expanding Tables.

> **Tip** To stop Table AutoExpansion before it starts, click the Microsoft Office Button, and then click Excel Options. In the Excel Options dialog box, click Proofing, and then click the AutoCorrect Options button to display the AutoCorrect dialog box. Click the AutoFormat As You Type tab, clear the Include new rows and columns in table check box, and then click OK twice.

You can add rows and columns to a table, or remove them from a table, by dragging the resize handle at the table's lower-right corner. If your table's headers contain a recognizable series of values (such as *Region1*, *Region2*, and *Region3*), and you drag the resize handle to create a fourth column, Excel 2007 creates the column with the label *Region4*—the next value in the series.

Tables often contain data you can summarize by calculating a sum or average, or by finding the maximum or minimum value in a column. To summarize one or more columns of data, you can add a Total row to your table.

Contoso	March	$	26,786.00
Lucerne Publishing	March	$	132,776.00
World Wide Importers	March	$	245,695.00
Total		**$**	**1,807,068.00**

When you add the Total row, Excel 2007 creates a formula that calculates the sum of the values in the rightmost table column. To change that summary operation or to add a summary operation to any other cell in the Total row, click the cell, click the arrow that appears, and then click the summary operation you want to apply. Clicking the More Functions item displays the Insert Function dialog box, from which you can select any of the functions in Excel 2007.

Much as it does when you create a new worksheet, Excel 2007 gives your tables generic names such as *Table1* and *Table2*. You can change a table name to something easier to recognize by clicking any cell in the table, clicking the Design contextual tab, and then, in the Properties group, editing the value in the Table Name field. Changing a table name might not seem important, but it helps make formulas that summarize table data much easier to understand. You should make a habit of renaming your tables so you can recognize the data they contain.

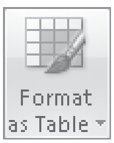
See Also For more information about using the Insert Function dialog box and about referring to tables in formulas, see "Creating Formulas to Calculate Values" in Chapter 7, "Performing Calculations on Data."

If for any reason you want to convert your table back to a normal range of cells, click any cell in the table and then, on the Table Tools contextual tab, in the Tools group, click Convert To Range. When Excel 2007 displays a message box asking if you're sure you want to convert the table to a range, click OK.

In this exercise, you will create a data table from existing data, add data to a table, add a Total row, change the Total row's summary operation, and rename the table.

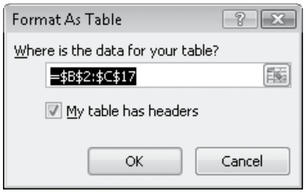
USE the *Driver Sort Times* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelData* folder.

OPEN the *Driver Sort Times* workbook.



1. Select cell **B2**.
2. On the **Home** tab, in the **Styles** group, click **Format as Table**, and then select a table style.

   The Format As Table dialog box opens.

3. Verify that the range *=$B$2:$C$17* appears in the **Where is the data for your table?** field and that the **My table has headers** check box is selected, and then click **OK**.

   Excel 2007 creates a table from your data and displays the Design contextual tab.

4. In cell B18, type **D116**, press Tab, type **100** in cell C18, and then press Enter.

   Excel 2007 includes the data in your table.

5. Select a cell in the table. Then on the **Design** contextual tab, in the **Table Style Options** group, select the **Total Row** check box.

   A Total row appears in your table.

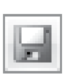
6. Select cell **C19**, click the arrow that appears at the right edge of the cell, and then click **Average**.

   Excel 2007 changes the summary operation to Average.

Drive	Sorting Minutes
D101	102
D102	162
D103	165
D104	91
D105	103
D106	127
D107	112
D108	137
D109	102
D110	147
D111	163
D112	109
D113	91
D114	107
D115	93
D116	100
Total	**119.4375**

7. On the **Design** contextual tab, in the **Properties** group, type the value **SortingSample01** in the **Table Name** field, and then press Enter.

   Excel 2007 renames your table.


Save

8. On the **Quick Access Toolbar**, click the **Save** button to save your work.

CLOSE the *Driver Sort Times* workbook. If you are not continuing directly to the next chapter, exit Excel.

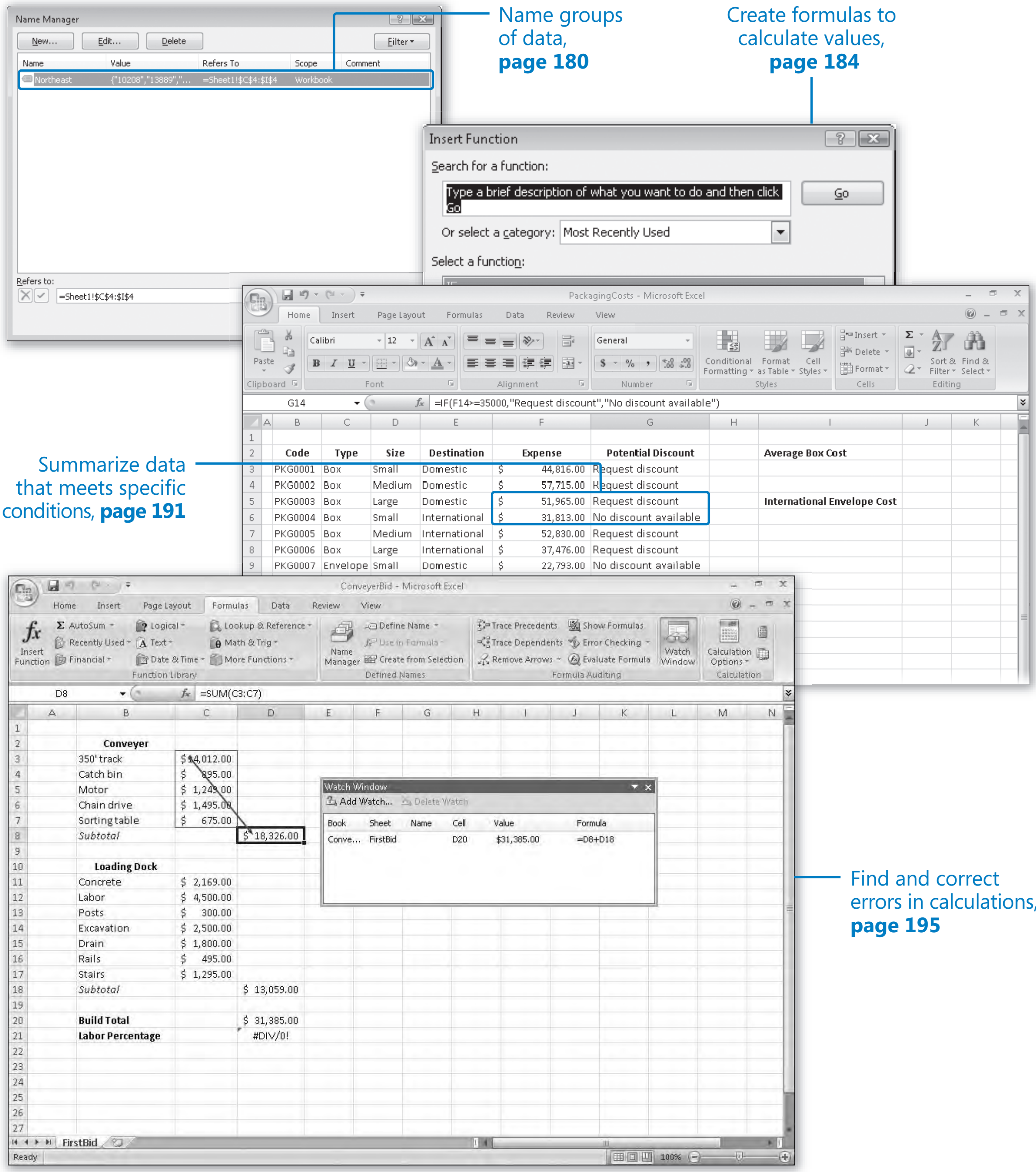
Key Points

- You can enter a series of data quickly by entering one or more values in adjacent cells, selecting the cells, and then dragging the fill handle. To change how dragging the fill handle extends a data series, hold down the Ctrl key.
- Dragging a fill handle displays the Auto Fill Options button, which enables you to specify whether to copy the selected cells' values, extend a recognized series, or apply the selected cells' formatting to the new cells.
- Excel 2007 enables you to enter data by using a drop-down list, AutoComplete, and Ctrl+Enter. You should experiment with these techniques and use the one that best fits your circumstances.
- When you copy (or cut) and paste cells, columns, or rows, Excel 2007 displays the Paste Options smart tag. You can use its controls to determine which elements of the cut or copied elements Excel 2007 applies when they are pasted back into the worksheet.
- You can find and replace data within a worksheet by searching for specific values or by searching for cells that have a particular format applied.
- Excel 2007 provides a variety of powerful proofing and research tools, enabling you to check your workbook's spelling, find alternative words using the Thesaurus, and translate words between languages.
- Data tables, which are new in Excel 2007, enable you to organize and summarize your data effectively.

Chapter at a Glance

Name groups of data, **page 180**

Create formulas to calculate values, **page 184**



Summarize data that meets specific conditions, **page 191**

Find and correct errors in calculations, **page 195**

7 Performing Calculations on Data

In this chapter, you will learn to:

- ✔ Name groups of data.
- ✔ Create formulas to calculate values.
- ✔ Summarize data that meets specific conditions.
- ✔ Find and correct errors in calculations.

Microsoft Office Excel 2007 workbooks give you a handy place to store and organize your data, but you can also do a lot more with your data in Excel 2007. One important task you can perform is to calculate totals for the values in a series of related cells. You can also use Excel 2007 to find out other information about the data you select, such as the maximum or minimum value in a group of cells. By finding the maximum or minimum value in a group, you can identify your best salesperson, product categories you might need to pay more attention to, or suppliers that consistently give you the best deal. Regardless of your bookkeeping needs, Excel 2007 gives you the ability to find the information you want. And if you should make an error, you can find the cause and correct it quickly.

Many times, you can't access the information you want without referencing more than one cell, and it's also often true that you'll use the data in the same group of cells for more than one calculation. Excel 2007 makes it easy to reference a number of cells at once, enabling you to define your calculations quickly.

In this chapter, you'll learn how to streamline references to groups of data on your worksheets and how to create and correct formulas that summarize Consolidated Messenger's business operations.

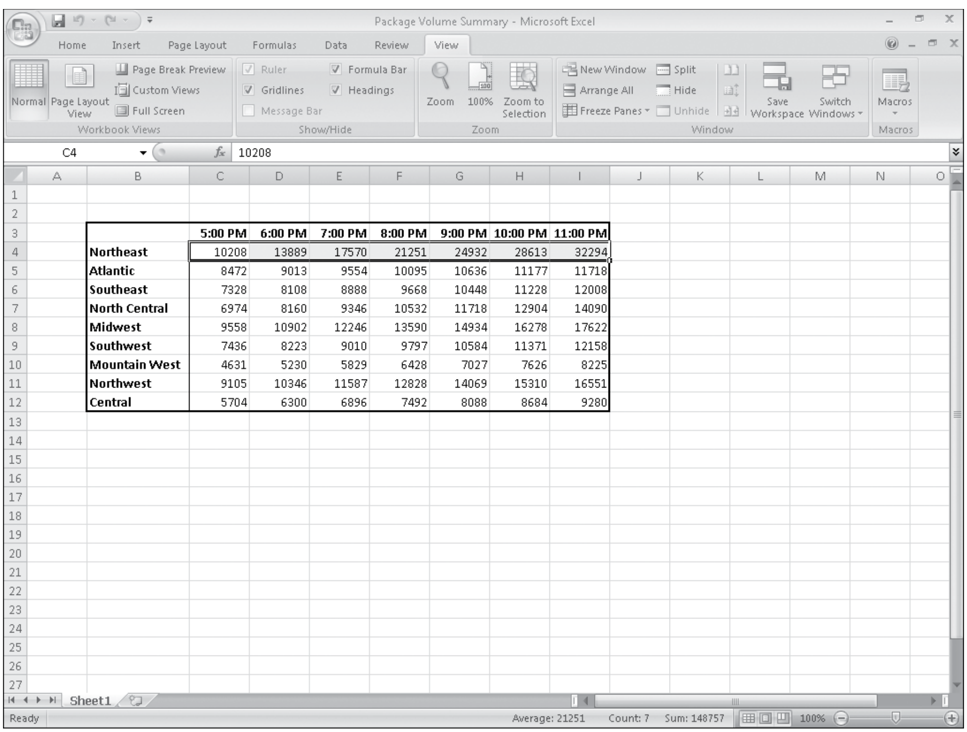
See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Naming Groups of Data

When you work with large amounts of data, it's often useful to identify groups of cells that contain related data. For example, you can create a worksheet in which cells C4:I4 hold the number of packages Consolidated Messenger's Northeast processing facility handled from 5:00 P.M. to 12:00 A.M. on the previous day.

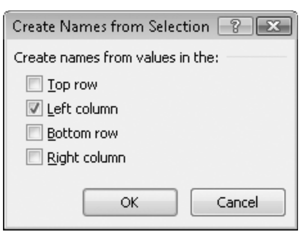


Instead of specifying the cells individually every time you want to use the data they contain, you can define those cells as a ***range*** (also called a ***named range***). For instance, you can group the items from the preceding graphic into a range named NortheastLastDay. Whenever you want to use the contents of that range in a calculation, you can simply use the name of the range instead of specifying each cell individually.

> **Tip** Yes, you could just name the range *Northeast*, but if you use the range's values in a formula in another worksheet, the more descriptive range name tells you and your colleagues exactly what data is used in the calculation.

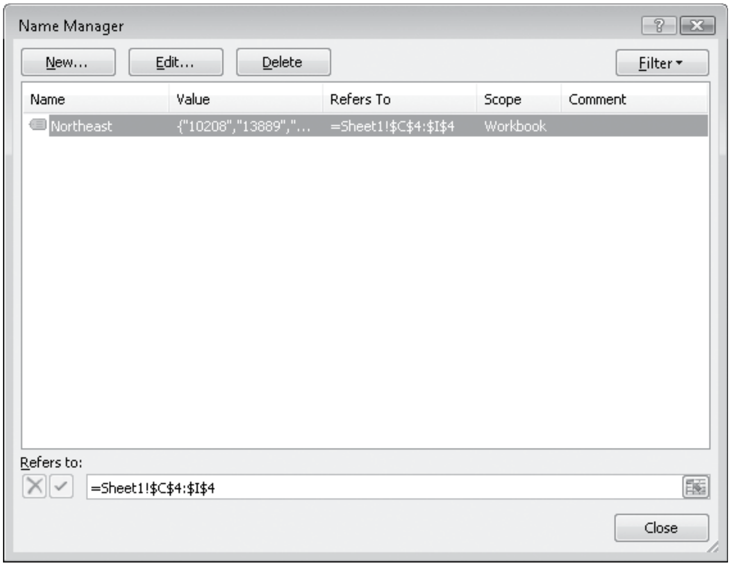
To create a named range, select the cells you want to include in your range, click the Formulas tab, and then, in the Defined Names group, click Define Name to display the New Name dialog box. In the New Name dialog box, type a name in the Name field, verify that the cells you selected appear in the Refers To field, and then click OK. You can also add a comment about the field in the Comment field and select whether you want to make the name available for formulas in the entire workbook or just on an individual worksheet.

If the cells you want to define as a named range have a label you want to use as the range's name, you can display the Formulas tab and then, in the Defined Names group, click Create From Selection to display the Create Names From Selection dialog box. In the Create Names From Selection dialog box, select the check box that represents the label's position in relation to the data cells, and then click OK.



A final way to create a named range is to select the cells you want in the range, click in the Name box next to the formula bar, and then type the name for the range. You can display the ranges available in a workbook by clicking the Name arrow.

To manage the named ranges in a workbook, display the Formulas tab, and then, in the Defined Names group, click Name Manager to display the Name Manager dialog box.



When you click a named range, Excel 2007 displays the cells it encompasses in the Refers To field. Clicking the Edit button displays the Edit Name dialog box, which is a version of the New Name dialog box, enabling you to change a named range's definition. You can also get rid of a name by clicking it, clicking the Delete button, and then clicking OK in the confirmation dialog box that opens.

> **Important** If your workbook contains a lot of named ranges, you can click the Filter button in the Name Manager dialog box and select a criterion to limit the names displayed in the Name Manager dialog box.

In this exercise, you will create named ranges to streamline references to groups of cells.

> **USE** the *VehicleMiles* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelFormulas* folder.
>
> **BE SURE TO** start Excel 2007 before beginning this exercise.
>
> **OPEN** the *VehicleMiles* workbook.

1. Select cells **C4:G4**.
2. In the **Name** box on the left of the formula bar, type **V101LastWeek**, and then press Enter.

   Excel 2007 creates a named range named *V101LastWeek*.

3. On the **Formulas** tab, in the **Defined Names** group, click **Name Manager**.

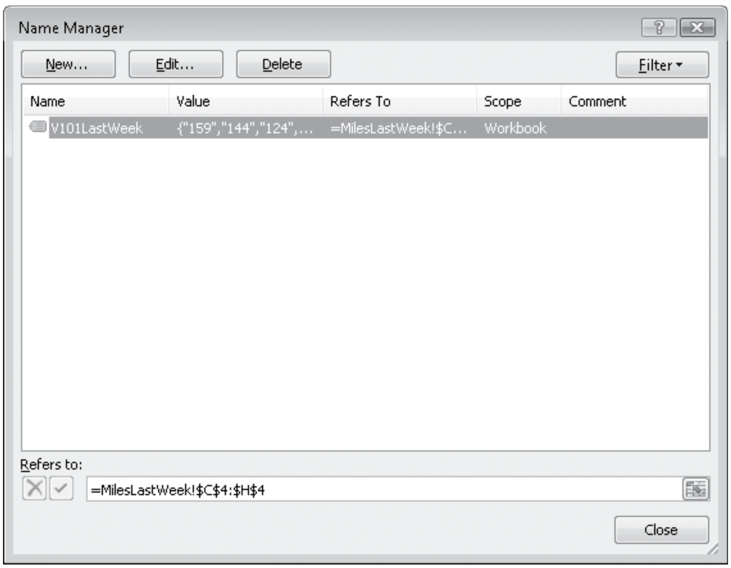
   The Name Manager dialog box opens.

4. Click the **V101LastWeek** name.

   The cell range to which the V101LastWeek name refers appears in the Refers To field.

5. Edit the cell range in the **Refers to** field to =LastWeekMiles!$C$4:$H$4, click **OK**, and then click the check mark button next to the **Refers to** field.

   Excel 2007 changes the named range's definition.



6. Click **Close**.

   The Name Manager dialog box closes.

7. Select the cell range **C5:H5**.

8. On the **Formulas** tab, in the **Defined Names** group, click **Define Name**.

   The New Name dialog box opens.

9. In the **Name** field, type V102LastWeek.

10. Verify that the definition in the **Refers to** field is *=LastWeekMiles!$C$5:$H$5*.

11. Click **OK**.

    Excel 2007 creates the name and closes the New Name dialog box.

CLOSE the *VehicleMiles* workbook.

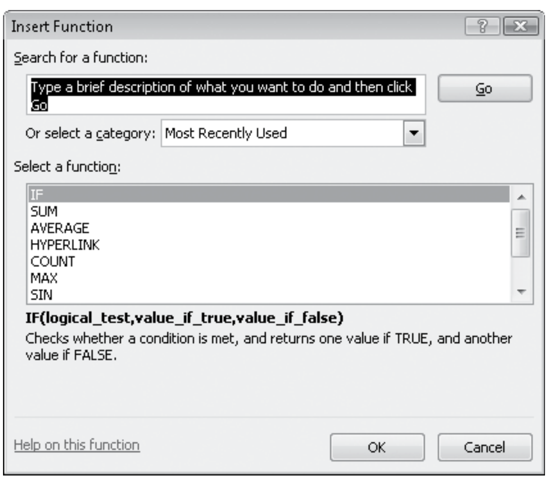
Creating Formulas to Calculate Values

After you add your data to a worksheet and define ranges to simplify data references, you can create a formula, or an expression that performs calculations on your data. For example, you can calculate the total cost of a customer's shipments, figure the average number of packages for all Wednesdays in the month of January, or find the highest and lowest daily package volumes for a week, month, or year.

To write an Excel 2007 formula, you begin the cell's contents with an equal (=) sign; when Excel 2007 sees it, it knows that the expression following it should be interpreted as a calculation, not text. After the equal sign, type the formula. For example, you can find the sum of the numbers in cells C2 and C3 using the formula *=C2+C3*. After you have entered a formula into a cell, you can revise it by clicking the cell and then editing the formula in the formula bar. For example, you can change the preceding formula to *=C3-C2*, which calculates the difference between the contents of cells C2 and C3.

> **Troubleshooting** If Excel 2007 treats your formula as text, make sure that you haven't accidentally put a space before the equal sign. Remember, the equal sign must be the first character!

Typing the cell references for 15 or 20 cells in a calculation would be tedious, but Excel 2007 makes it easy to handle complex calculations. To create a new calculation, click the Formulas tab, and then in the Function Library group, click Insert Function. The Insert Function dialog box opens, with a list of functions, or predefined formulas, from which you can choose.



The following table describes some of the most useful functions in the list.

Function	Description
SUM	Finds the sum of the numbers in the specified cells
AVERAGE	Finds the average of the numbers in the specified cells
COUNT	Finds the number of entries in the specified cells
MAX	Finds the largest value in the specified cells
MIN	Finds the smallest value in the specified cells

Two other functions you might use are the *NOW()* and *PMT()* functions. The *NOW()* function returns the time the workbook was last opened, so the value will change every time the workbook is opened. The proper form for this function is *=NOW()*. To update the value to the current date and time, just save your work, close the workbook, and then reopen it.

The *PMT()* function is a bit more complex. It calculates payments due on a loan, assuming a constant interest rate and constant payments. To perform its calculations, the *PMT()* function requires an interest rate, the number of months of payments, and the starting balance. The elements to be entered into the function are called ***arguments*** and must be entered in a certain order. That order is written *PMT(rate, nper, pv, fv, type)*. The following table summarizes the arguments in the *PMT()* function.

Argument	Description
rate	The interest rate, to be divided by 12 for a loan with monthly payments
nper	The total number of payments for the loan
pv	The amount loaned (pv is short for present value, or principal)
fv	The amount to be left over at the end of the payment cycle (usually left blank, which indicates 0)
type	0 or 1, indicating whether payments are made at the beginning or at the end of the month (usually left blank, which indicates 0, or the end of the month)

If Consolidated Messenger wanted to borrow $2,000,000 at a 6 percent interest rate and pay the loan back over 24 months, you could use the *PMT()* function to figure out the monthly payments. In this case, the function would be written *=PMT(6%/12, 24, 2000000)*, which calculates a monthly payment of $88,641.22.

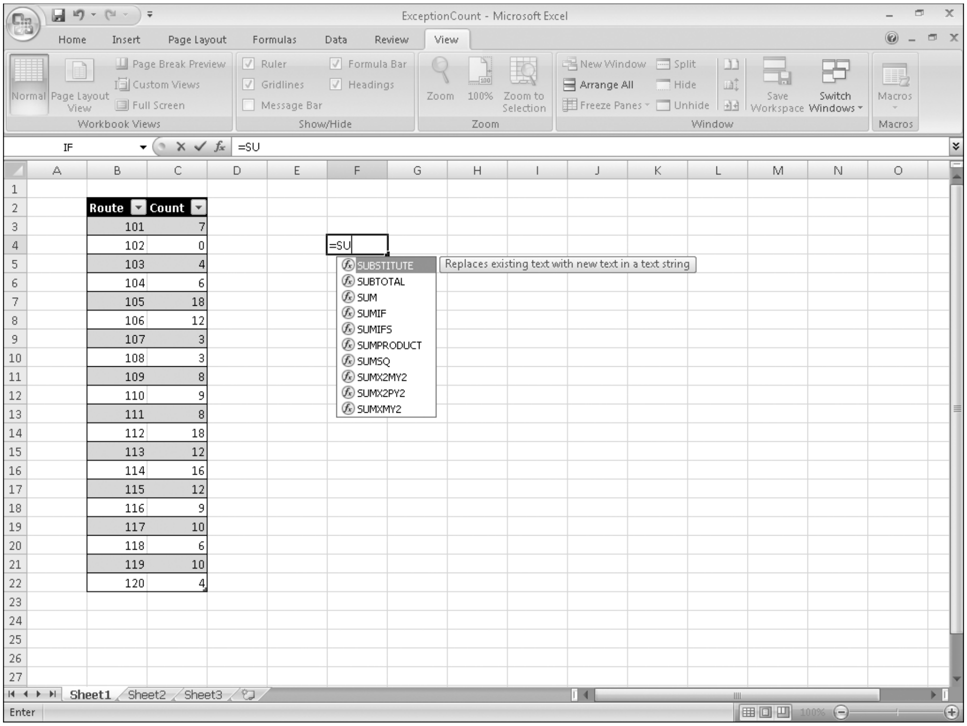
You can also use the names of any ranges you defined to supply values for a formula. For example, if the named range NortheastLastDay refers to cells C4:I4, you can calculate the average of cells C4:I4 with the formula *=AVERAGE(NortheastLastDay)*. In previous versions of Excel, you had to type the name into your formula by hand. Excel 2007 enables you to add functions, named ranges, and table references to your formulas more efficiently by using the new ***Formula AutoComplete*** capability. Just as AutoComplete offers to fill in a cell's text value when Excel 2007 recognizes that the value you're typing matches a previous entry, Formula AutoComplete offers to fill in a function, named range, or table reference while you create a formula.

As an example, consider a worksheet that contains a two-column table named Exceptions. The first column is labeled Route; the second is labeled Count.

Route	Count
101	7
102	0
103	4
104	6
105	18
106	12
107	3
108	3
109	8
110	9
111	8
112	18
113	12
114	16
115	12
116	9
117	10
118	6
119	10
120	4

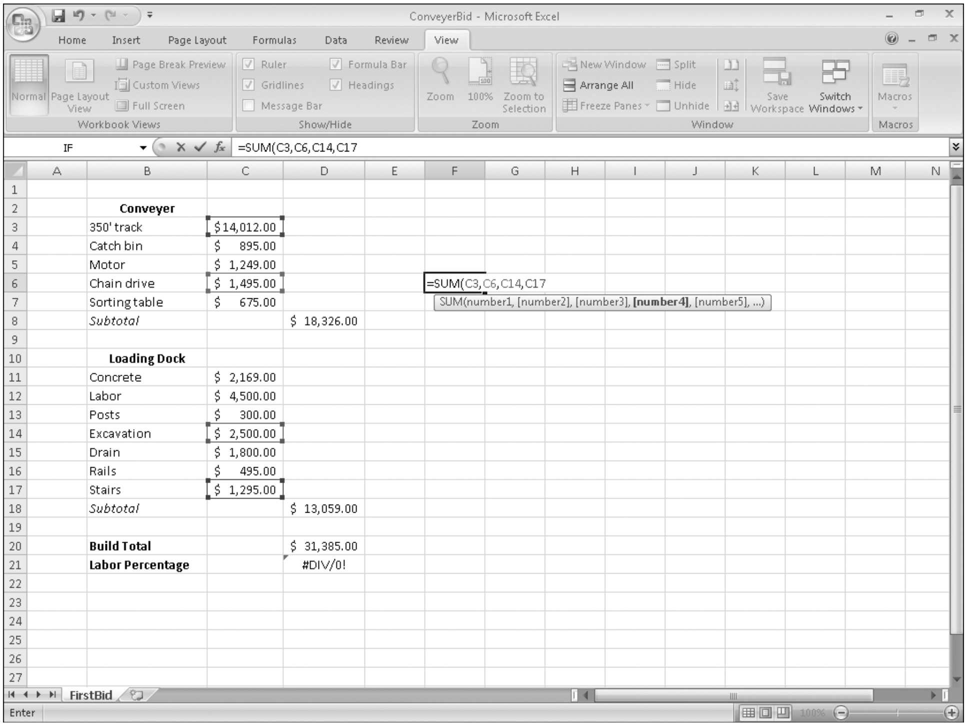
You refer to a table by typing the table name, followed by the column or row name in square brackets. For example, the table reference *Exceptions[Count]* would refer to the Exceptions table's Count column.

To create a formula that finds the total number of exceptions by using the *SUM* function, you begin by typing *=SU*. When you type the letter *S*, Formula AutoComplete lists functions that begin with the letter *S*; when you type the letter *U*, Excel 2007 narrows the list down to the functions that start with the letters *SU*.



To add the *SUM* function (followed by an opening parenthesis) to the formula, click *SUM* and then press Tab. To begin adding the table column reference, type the letter *E*. Excel 2007 displays a list of available functions, tables, and named ranges that start with the letter *E*. Click Exceptions, and press Tab to add the table reference to the formula. Then, because you want to summarize the values in the table's Count column, type *[Count]* to create the formula *=SUM(Exceptions[Count])*.

If you want to include a series of contiguous cells in a formula, but you haven't defined the cells as a named range, you can click the first cell in the range and drag to the last cell. If the cells aren't contiguous, hold down the Ctrl key and click the cells to be included. In both cases, when you release the mouse button, the references of the cells you selected appear in the formula.



After you create a formula, you can copy it and paste it into another cell. When you do, Excel 2007 tries to change the formula so that it works in the new cells. For instance, suppose that you have a worksheet in which cell D8 contains the formula *=SUM(C2:C6)*. Clicking cell D8, copying the cell's contents, and then pasting the result into cell D16 writes *=SUM(C10:C14)* into cell D16. Excel 2007 has reinterpreted the formula so that it fits the surrounding cells! Excel 2007 knows it can reinterpret the cells used in the formula because the formula uses a ***relative reference***, or a reference that can change if the formula is copied to another cell. Relative references are written with just the cell row and column (for example, C14). If you want a cell reference to remain constant when the formula using it is copied to another cell, you can use an absolute reference. To write a cell reference as an absolute reference, type *$* before the row name and the column number. If you want the formula in cell D16 to show the sum of values in cells C10 through C14 regardless of the cell into which it is pasted, you can write the formula as *=SUM($C$10:$C$14)*.

> **Tip** If you copy a formula from the formula bar, use absolute references or use only named ranges in your formula. Excel 2007 doesn't change the cell references when you copy your formula to another cell.

One quick way to change a cell reference from relative to absolute is to select the cell reference on the formula bar and then press F4. Pressing F4 cycles a cell reference through the four possible types of references:

- Relative columns and rows (for example, *C4*)
- Absolute columns and rows (for example, *$C$4*)
- Relative columns and absolute rows (for example, *C$4*)
- Absolute columns and relative rows (for example, *$C4*)

In this exercise, you will create a formula manually, revise it to include additional cells, create a formula that contains a table reference, create a formula with relative references, and change the formula so it contains absolute references.

USE the *ITExpenses* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelFormulas* folder.

OPEN the *ITExpenses* workbook.

1. If necessary, display the **Summary** worksheet. Then, in cell F9, type =C4, and press Enter.

   The value *$385,671.00* appears in cell F9.

2. Select cell **F9**, and then on the formula bar, erase the existing formula and type =SU.

   Formula AutoComplete displays a list of possible functions to use in the formula.

3. In the **Formula AutoComplete** list, click **SUM**, and then press Tab.

   Excel 2007 changes the contents of the formula bar to *=SUM(*.

4. Select the cell range **C3:C8**, type a right parenthesis (the *)* character) to make the formula bar's contents *=SUM(C3:C8)*, and then press Enter.

   The value *$2,562,966.00* appears in cell F9.

5. In cell F10, type =SUM(C4:C5), and then press Enter.

6. Select cell **F10**, and then on the formula bar, select the cell reference **C4**, and press F4.

   Excel 2007 changes the cell reference to *$C$4*.

7. On the formula bar, select the cell reference **C5**, press F4, and then press Enter.

   Excel 2007 changes the cell reference to *$C$5*.

8. On the tab bar, click the **JuneLabor** sheet tab.

   The JuneLabor worksheet opens.

9. In cell F13, type =SUM(J.

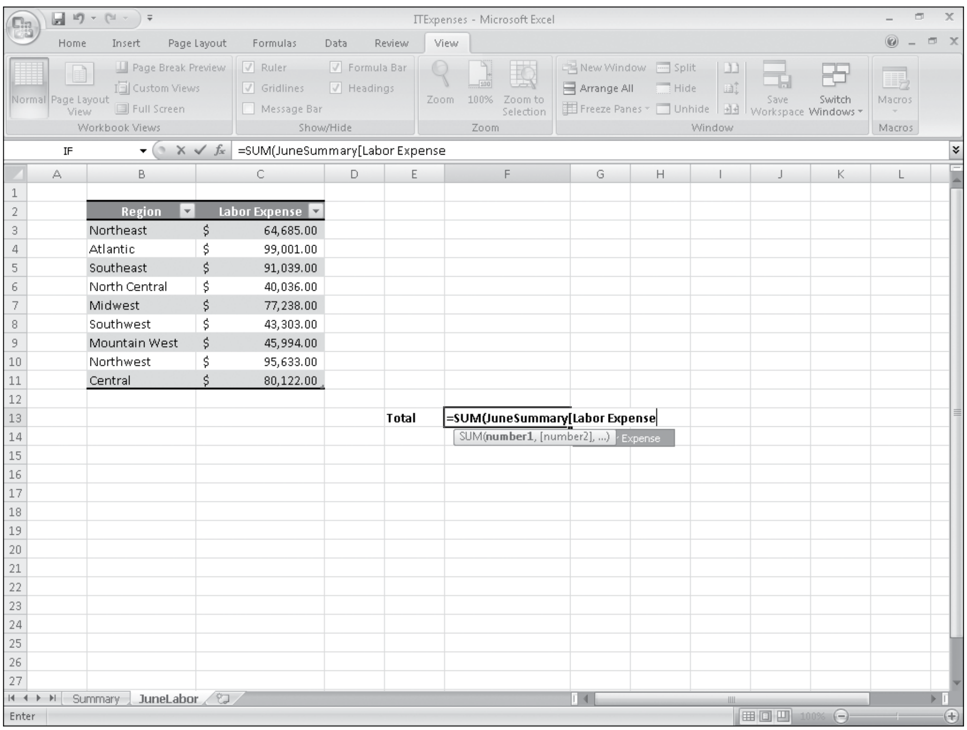
   Excel 2007 displays JuneSummary, the name of the table in the JuneLabor worksheet.

10. Press Tab.

    Excel 2007 extends the formula to read =*SUM(JuneSummary*.

11. Type [, and then in the Formula AutoComplete list, click **[Labor Expense]**, and press Tab.

    Excel 2007 extends the formula to read =*SUM(JuneSummary[Labor Expense*.



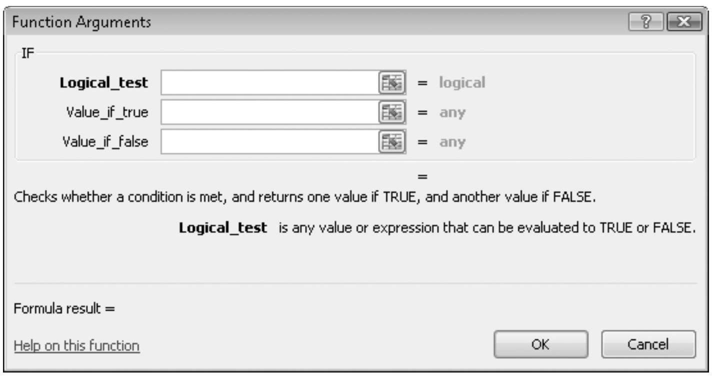
12. Type]) to complete the formula, and then press Enter.

    The value *$637,051.00* appears in cell F13.

CLOSE the *ITExpenses* workbook.

Summarizing Data That Meets Specific Conditions

Another use for formulas is to display messages when certain conditions are met. For instance, Consolidated Messenger's VP of Marketing, Craig Dewar, might have agreed to examine the rates charged to corporate customers who were billed for more than $100,000 during a calendar year. This kind of formula is called a ***conditional formula***, and it uses the *IF* function. To create a conditional formula, you click the cell to hold the formula and open the Insert Function dialog box. From within the dialog box, click *IF* in the list of available functions, and then click OK. The Function Arguments dialog box opens.



When you work with an *IF* function, the Function Arguments dialog box has three boxes: Logical_test, Value_if_true, and Value_if_false. The Logical_test box holds the condition you want to check. If the customer's year-to-date shipping bill appears in cell G8, the expression would be G8>100000.

Now you need to have Excel 2007 display messages that indicate whether Craig Dewar should evaluate the account for a possible rate adjustment. To have Excel 2007 print a message from an *IF* function, you enclose the message in quotes in the Value_if_true or Value_if_false box. In this case, you would type *"High-volume shipper—evaluate for rate decrease."* in the Value_if_true box and *"Does not qualify at this time."* in the Value_if_false box.

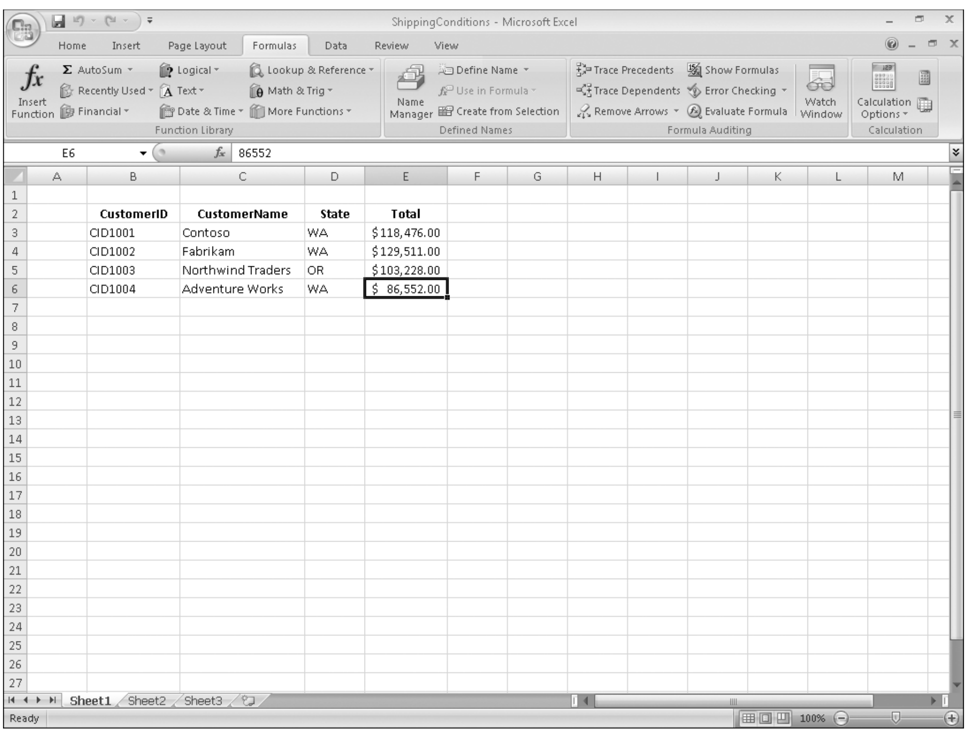
Excel 2007 also includes five new conditional functions with which you can summarize your data:

- *IFERROR*, which displays one value if a formula results in an error; another if it doesn't
- *AVERAGEIF*, which finds the average of values within a cell range that meet a given criterion

- *AVERAGEIFS*, which finds the average of values within a cell range that meet multiple criteria
- *SUMIFS*, which finds the sum of values in a range that meet multiple criteria
- *COUNTIFS*, which counts the number of cells in a range that meet multiple criteria

The *IFERROR* function enables you to display a custom error message instead of relying on the default Excel 2007 error messages to explain what happened. One example of an *IFERROR* formula is if you want to look up the CustomerID value from cell G8 in the Customers table by using the *VLOOKUP* function. One way to create such a formula is *=IFERROR(VLOOKUP(G8,Customers,2,false),"Customer not found")*. If the function finds a match for the CustomerID in cell G8, it displays the customer's name; if it doesn't find a match, it displays the text *Customer not found*.

The *AVERAGEIF* function is a variation on the existing *COUNTIF* and *SUMIF* functions. To create a formula using the *AVERAGEIF* function, you define the range to be examined, the criteria, and, if required, the range from which to draw the values. As an example, consider the following worksheet, which lists each customer's ID number, name, state, and total monthly shipping bill.



If you want to find the average order of customers from Washington State (abbreviated in the worksheet as WA), you can create the formula *=AVERAGEIF(D3:D6,"=WA", E3:E6)*.

The *AVERAGEIFS*, *SUMIFS*, and *COUNTIFS* functions extend the capabilities of the *AVERAGEIF*, *SUMIF*, and *COUNTIF* functions to allow for multiple criteria. If you want to find the sum of all orders of at least $100,000 placed by companies in Washington, you can create the formula *=SUMIFS(E3:E6, D3:D6, "=WA", E3:E6, ">=100000")*.

The *AVERAGEIFS* and *SUMIFS* functions start with a data range that contains values that the formula summarizes; you then list the data ranges and the criteria to apply to that range. In generic terms, the syntax runs *=AVERAGEIFS(data_range, criteria_range1, criteria1[,criteria_range2, criteria2…])*. The part of the syntax in square brackets is optional, so an *AVERAGEIFS* or *SUMIFS* formula that contains a single criterion works. The *COUNTIFS* function, which doesn't perform any calculations, doesn't need a data range—you just provide the criteria ranges and criteria. For example, you could find the number of customers from Washington billed at least $100,000 by using the formula *=COUNTIFS(D3:D6, "=WA", E3:E6, ">=100000")*.

In this exercise, you will create a conditional formula that displays a message if a condition is true, find the average of worksheet values that meet one criterion, and find the sum of worksheet values that meet two criteria.

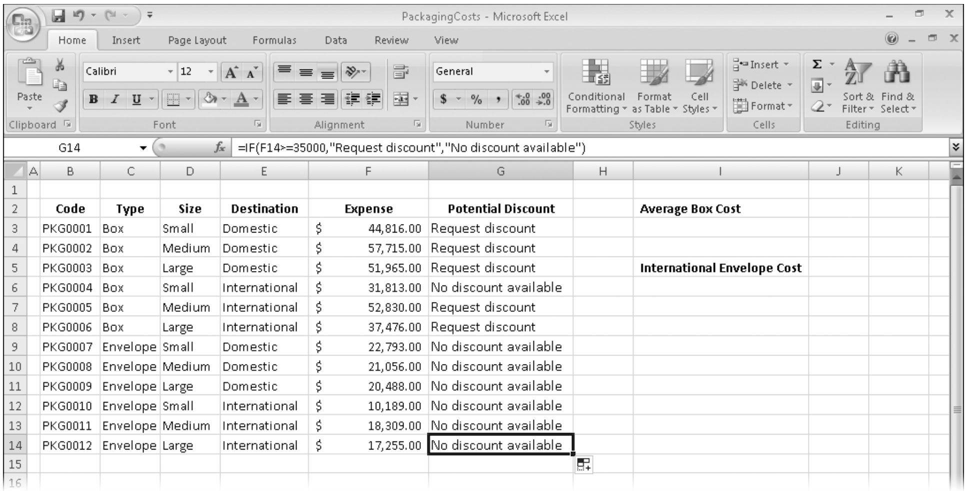
> **USE** the *PackagingCosts* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelFormulas* folder.
>
> **OPEN** the *PackagingCosts* workbook.

1. In cell G3, type the formula **=IF(F3>=35000,"Request discount","No discount available")**, and press Enter.

   Excel 2007 accepts the formula, which displays *Request discount* if the value in cell F3 is at least 35,000 and displays *No discount available* if not. The value *Request discount* appears in cell G3.

2. Click cell **G3**, and drag the fill handle down until it covers cell G14.

Excel 2007 copies the formula in cell G3 to cells G4:G14, adjusting the formula to reflect the cells' addresses. The results of the copied formulas appear in cells G4:G14.

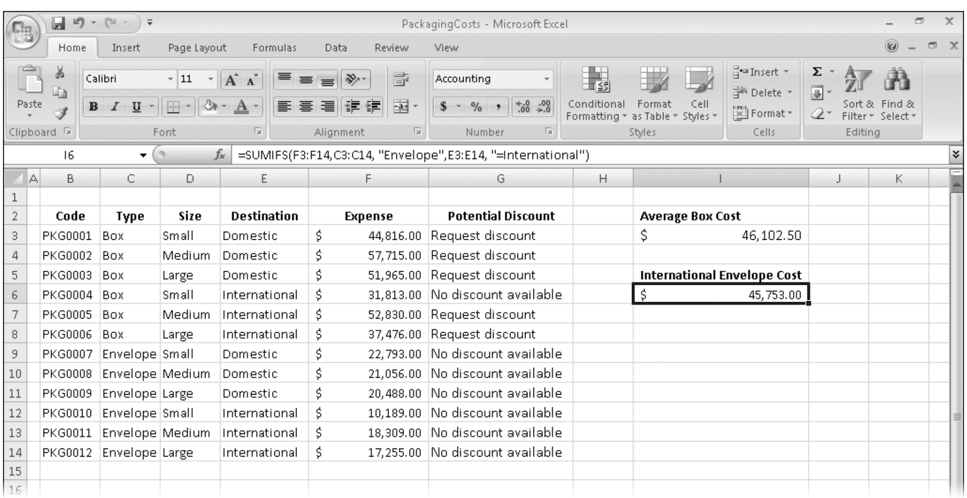


3. In cell I3, type the formula **=AVERAGEIF(C3:C14, "=Box", F3:F14)**, and press Enter.

The value *$46,102.50*, which represents the average cost per category of boxes, appears in cell I3.

4. In cell I6, type **=SUMIFS(F3:F14, C3:C14, "=Envelope", E3:E14, "=International")**.

The value *$45,753.00*, which represents the total cost of all envelopes used for international shipments, appears in cell I6.

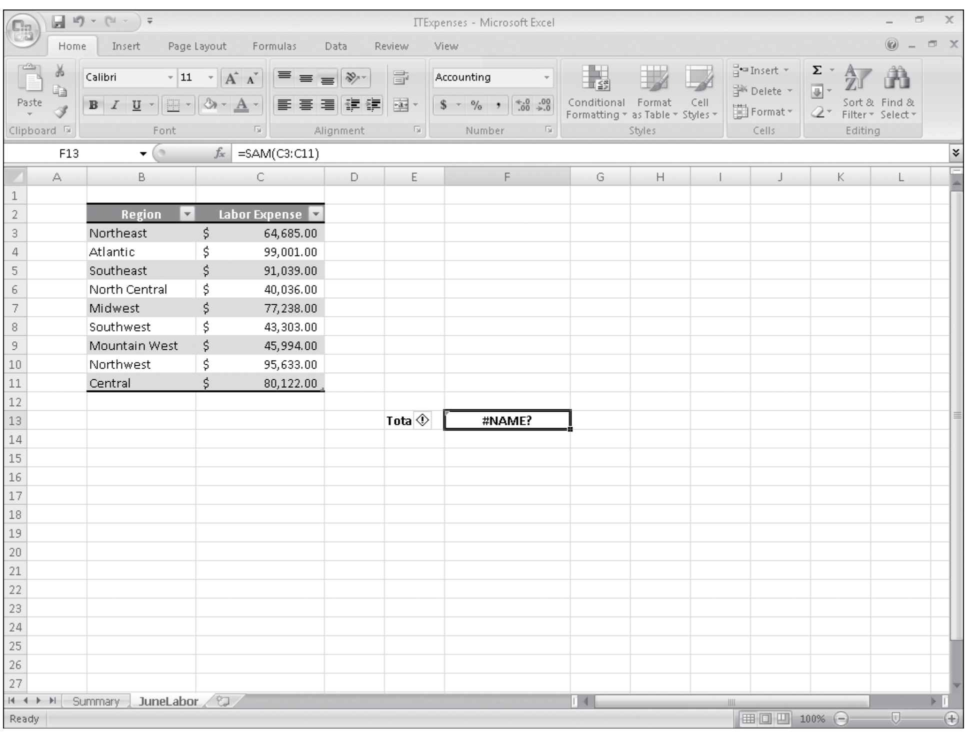


CLOSE the *PackagingCosts* workbook.

Finding and Correcting Errors in Calculations

Including calculations in a worksheet gives you valuable answers to questions about your data. As is always true, however, it is possible for errors to creep into your formulas. Excel 2007 makes it easy to find the source of errors in your formulas by identifying the cells used in a given calculation and describing any errors that have occurred. The process of examining a worksheet for errors in formulas is referred to as ***auditing***.

Excel 2007 identifies errors in several ways. The first way is to fill the cell holding the formula generating the error with an ***error code***. In the following graphic, cell F13 has the error code *#NAME?*.

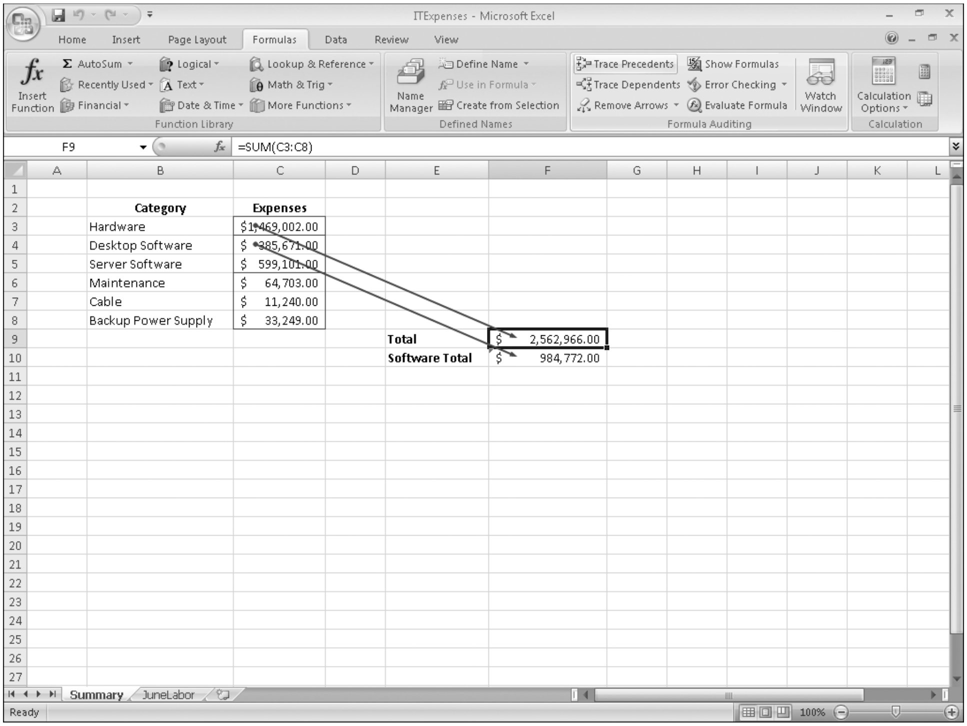


When a cell with an erroneous formula is the active cell, an Error button appears next to it. You can click the arrow to the right of the button to display a menu with options that provide information about the error and offer to help you fix it. The following table lists the most common error codes and what they mean.

Error code	Description
#####	The column isn't wide enough to display the value.
#VALUE!	The formula has the wrong type of argument (such as text in which a *TRUE* or *FALSE* value is required).
#NAME?	The formula contains text that Excel 2007 doesn't recognize (such as an unknown named range).
#REF!	The formula refers to a cell that doesn't exist (which can happen whenever cells are deleted).
#DIV/0!	The formula attempts to divide by zero.

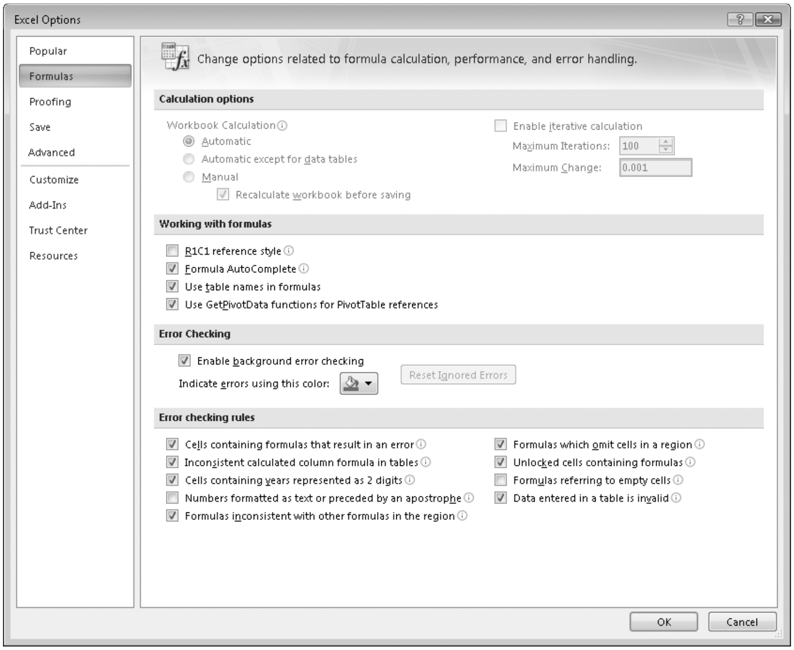
Another technique you can use to find the source of formula errors is to ensure that the appropriate cells are providing values for the formula. For example, you might want to calculate the total number of deliveries for a service level, but you could accidentally create a formula referring to the service levels' names instead of their quantities. You can identify what kind of error has appeared by having Excel 2007 trace a cell's ***precedents***, which are the cells with values used in the active cell's formula. Excel 2007 identifies a cell's precedents by drawing a blue tracer arrow from the precedent to the active cell.

You can also audit your worksheet by identifying cells with formulas that use a value from a given cell. For example, you might use one region's daily package total in a formula that calculates the average number of packages delivered per region on a given day. Cells that use another cell's value in their calculations are known as ***dependents***, meaning that they depend on the value in the other cell to derive their own value. As with tracing precedents, you can click the Formulas tab, and then in the Formula Auditing group, click Trace Dependents to have Excel 2007 draw blue arrows from the active cell to those cells that have calculations based on that value.



If the cells identified by the tracer arrows aren't the correct cells, you can hide the arrows and correct the formula. To hide the tracer arrows on a worksheet, display the Formulas tab, and then in the Formula Auditing group, click Remove Arrows.

If you prefer to have the elements of a formula error presented as text in a dialog box, you can use the Error Checking dialog box (which you can display by displaying the Formulas tab, and then in the Formula Auditing group, clicking the Error Checking button) to view the error and the formula in the cell in which the error occurs. You can also use the controls in the Error Checking dialog box to move through the formula one step at a time, to choose to ignore the error, or to move to the next or the previous error. If you click the Options button in the dialog box, you can also use the controls in the Excel Options dialog box to change how Excel 2007 determines what is an error and what isn't.



Tip You can have the Error Checking tool ignore formulas that don't use every cell in a region (such as a row or column). If you clear the Formulas that omit cells in a region check box, you can create formulas that don't add up every value in a row or column (or rectangle) without Excel 2007 marking them as an error.

For times when you just want to display the results of each step of a formula and don't need the full power of the Error Checking tool, you can use the Evaluate Formula dialog box to move through each element of the formula. To display the Evaluate Formula dialog box, you display the Formulas tab and then, in the Formula Auditing group, click the Evaluate Formula button. The Evaluate Formula dialog box is much more useful for examining formulas that don't produce an error but aren't generating the result you expect.

Finally, you can monitor the value in a cell regardless of where in your workbook you are by opening a Watch Window that displays the value in the cell. For example, if one of your formulas uses values from cells in other worksheets or even other workbooks, you can set a watch on the cell that contains the formula and then change the values in the other cells. To set a watch, click the cell you want to monitor, and then on the Formulas tab, in the Formula Auditing group, click Watch Window. Click Add Watch to have Excel 2007 monitor the selected cell.

As soon as you type in the new value, the Watch Window displays the new result of the formula. When you're done watching the formula, select the watch, click Delete Watch, and close the Watch Window.

In this exercise, you use the formula-auditing capabilities in Excel 2007 to identify and correct errors in a formula.

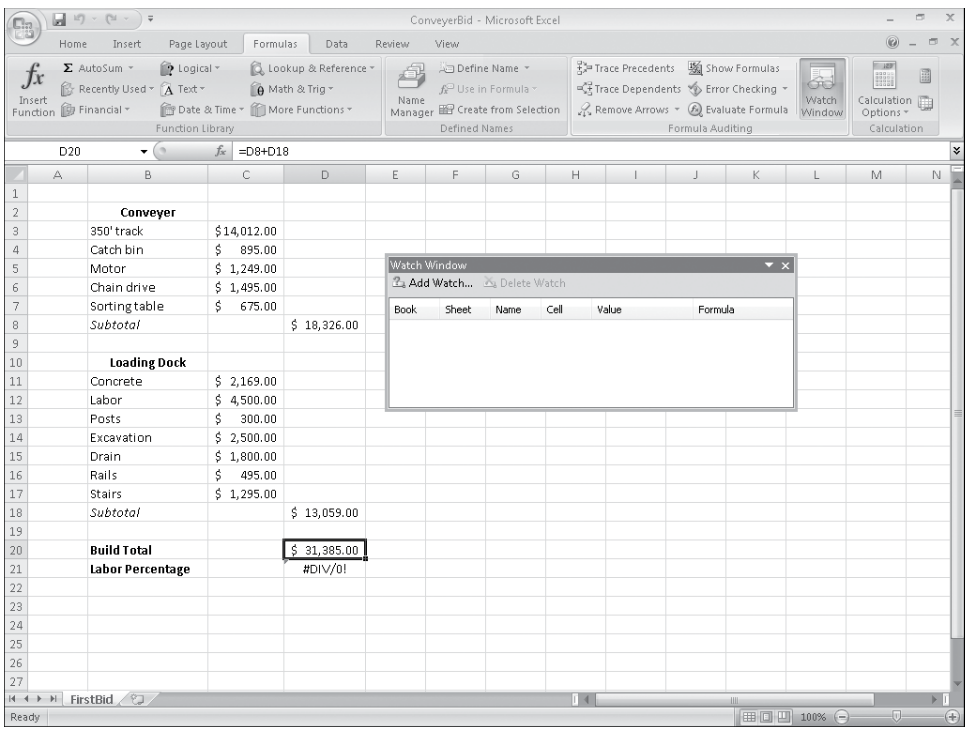
USE the *ConveyerBid* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelFormulas* folder.

OPEN the *ConveyerBid* workbook.

1. Click cell **D20**.

2. On the **Formulas** tab, in the **Formula Auditing** group, click **Watch Window**.

   The Watch Window opens.



3. Click **Add Watch**, and then in the **Add Watch** dialog box, click **Add**.

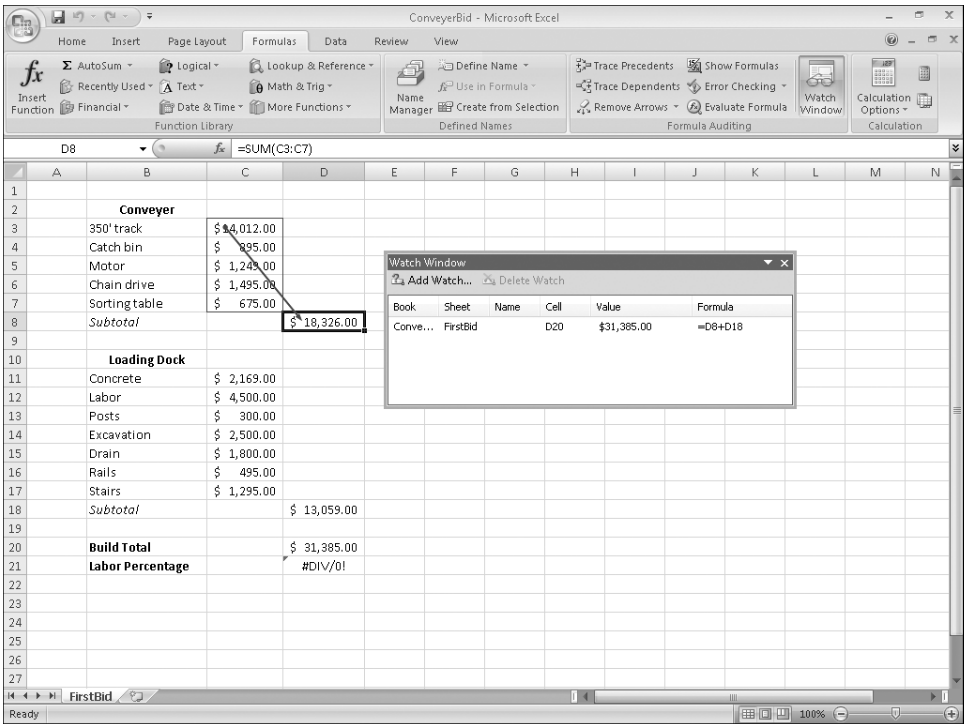
   Cell D20 appears in the Watch Window.

4. Click cell **D8**.

   =SUM(C3:C7) appears in the formula bar.

5. On the **Formulas** tab, in the **Formula Auditing** group, click the **Trace Precedents** button.

   A blue arrow appears between cell D8 and the cell range C3:C7, indicating that the cells in the range C3:C7 are precedents of the value in cell D8.



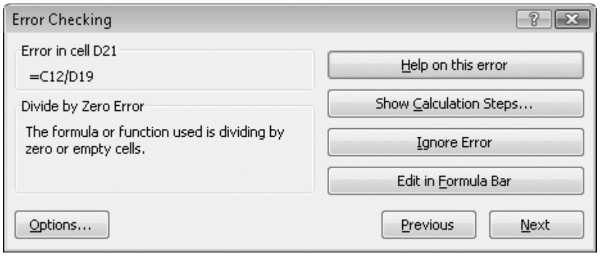
6. On the **Formulas** tab, in the **Formula Auditing** group, click the **Remove Arrows** button.

   The arrow disappears.

7. Click cell **A1**.

8. On the **Formulas** tab, in the **Formula Auditing** group, click the **Error Checking** button.

   The Error Checking dialog box opens.



9. Click **Next**.

   Excel 2007 displays a message box indicating that there are no more errors in the worksheet.

10. Click **OK**.

    The message box and the Error Checking dialog box close.

11. On the **Formulas** tab, in the **Formula Auditing** group, click the **Error Checking** arrow, and then in the list, click **Trace Error**.

    Blue arrows appear, pointing to cell D21 from cells C12 and D19. These arrows indicate that using the values (or lack of values, in this case) in the indicated cells generates the error in cell D21.

12. On the **Formulas** tab, in the **Formula Auditing** group, click **Remove Arrows**.

    The arrows disappear.

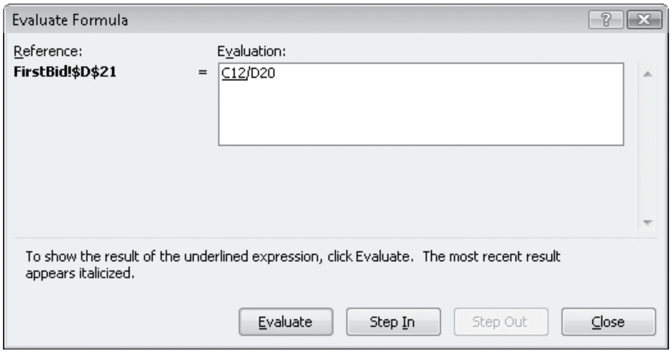
13. In the formula bar, delete the existing formula, type =C12/D20, and press Enter.

    The value *14%* appears in cell D21.

14. Click cell **D21**.

15. On the **Formulas** tab, in the **Formula Auditing** group, click the **Evaluate Formula** button.

The Evaluate Formula dialog box opens, with the formula from cell D21 displayed.



16. Click **Evaluate** three times to step through the formula's elements, and then click **Close**.

    The Evaluate Formula dialog box closes.

17. In the **Watch Window**, click the watch in the list.

18. Click **Delete Watch**.

    The watch disappears.

19. On the **Formulas** tab, in the **Formula Auditing** group, click **Watch Window**.

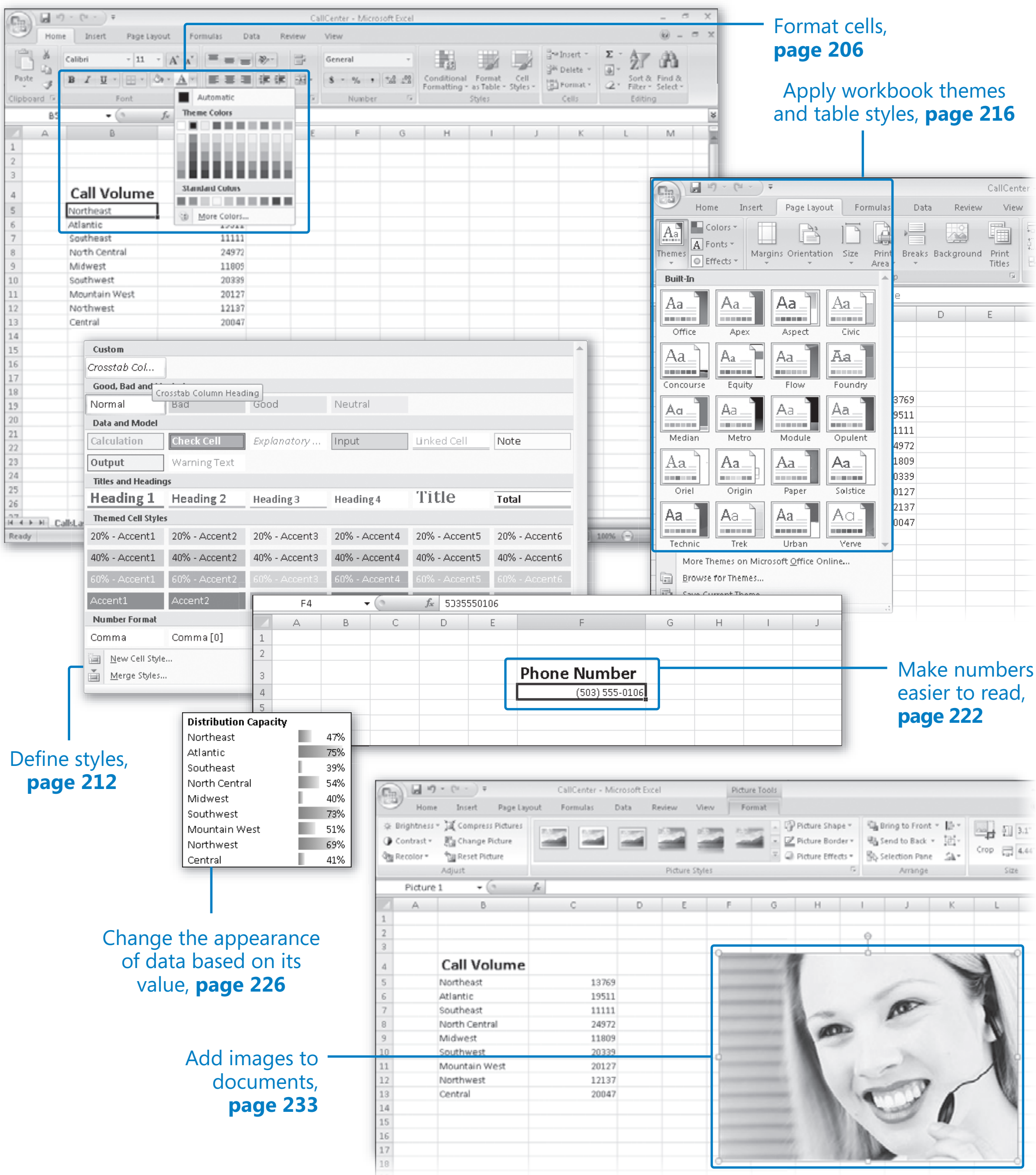
    The Watch Window closes.

CLOSE the *ConveyerBid* workbook. If you are not continuing directly to the next chapter, exit Excel.

Key Points

- You can add a group of cells to a formula by typing the formula, and then at the spot in the formula in which you want to name the cells, selecting the cells by using the mouse.
- Creating named ranges enables you to refer to entire blocks of cells with a single term, saving you lots of time and effort. You can use a similar technique with table data, referring to an entire table or one or more table columns.
- When you write a formula, be sure you use absolute referencing ($A$1) if you want the formula to remain the same when it's copied from one cell to another or use relative referencing (A1) if you want the formula to change to reflect its new position in the worksheet.
- Instead of typing a formula from scratch, you can use the Insert Function dialog box to help you on your way.
- You can monitor how the value in a cell changes by adding a watch to the Watch Window.
- To see which formulas refer to the values in the selected cell, use Trace Dependents; if you want to see which cells provide values for the formula in the active cell, use Trace Precedents.
- You can step through the calculations of a formula in the Evaluate Formula dialog box or go through a more rigorous error-checking procedure by using the Error Checking tool.

Chapter at a Glance



8 Changing Workbook Appearance

In this chapter, you will learn to:

- ✔ Format cells.
- ✔ Define styles.
- ✔ Apply workbook themes and table styles.
- ✔ Make numbers easier to read.
- ✔ Change the appearance of data based on its value.
- ✔ Add images to documents.

Entering data into a workbook efficiently saves you time, but you must also ensure that your data is easy to read. Microsoft Office Excel 2007 gives you a wide variety of ways to make your data easier to understand; for example, you can change the font, character size, or color used to present a cell's contents. Changing how data appears on a worksheet helps set the contents of a cell apart from the contents of surrounding cells. The simplest example of that concept is a data label. If a column on your worksheet has a list of days, you can set a label (for example, Day) apart easily by presenting it in bold type that's noticeably larger than the type used to present the data to which it refers. To save time, you can define a number of custom formats and then apply them quickly to the desired cells.

You might also want to specially format a cell's contents to reflect the value in that cell. For instance, Jenny Lysaker, the chief operating officer of Consolidated Messenger, might want to create a worksheet that displays the percentage of improperly delivered packages from each regional distribution center. If that percentage exceeds a threshold, she could have Excel 2007 display a red traffic light icon, indicating that the center's performance is out of tolerance and requires attention.

In addition to changing how data appears in the cells of your worksheet, you can also use headers and footers to add page numbers, current data, or graphics to the top and bottom of every printed page.

In this chapter, you'll learn how to change the appearance of data, apply existing formats to data, make numbers easier to read, change data's appearance based on its value, make printouts easier to follow, and position your data on the printed page.

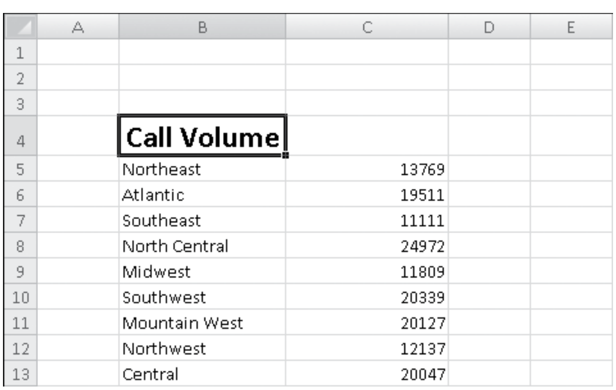
See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Formatting Cells

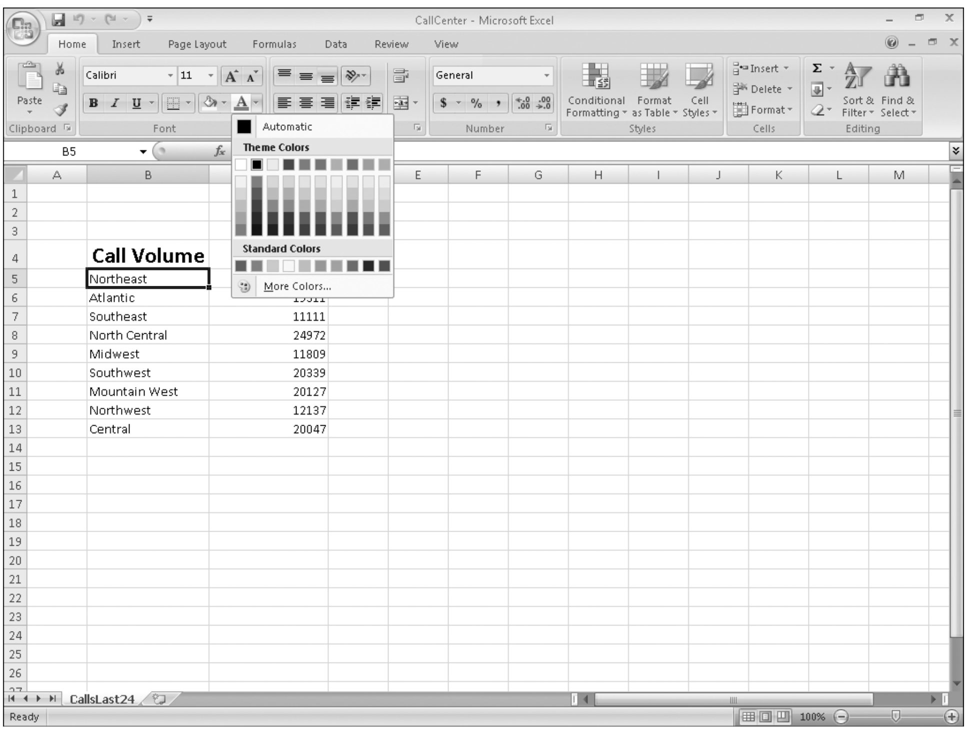
Excel 2007 spreadsheets can hold and process lots of data, but when you manage numerous spreadsheets it can be hard to remember from a worksheet's title exactly what data is kept in that worksheet. Data labels give you and your colleagues information about data in a worksheet, but it's important to format the labels so that they stand out visually. To make your data labels or any other data stand out, you can change the format of the cells in which the data is stored.



Most of the tools you need to change a cell's format can be found on the Home tab. You can apply the formatting represented on a button by selecting the cells you want to apply the style to and then clicking the appropriate button. If you want to set your data labels apart by making them appear bold, click the Bold button. If you have already made a cell's contents bold, selecting the cell and clicking the Bold button will remove the formatting.

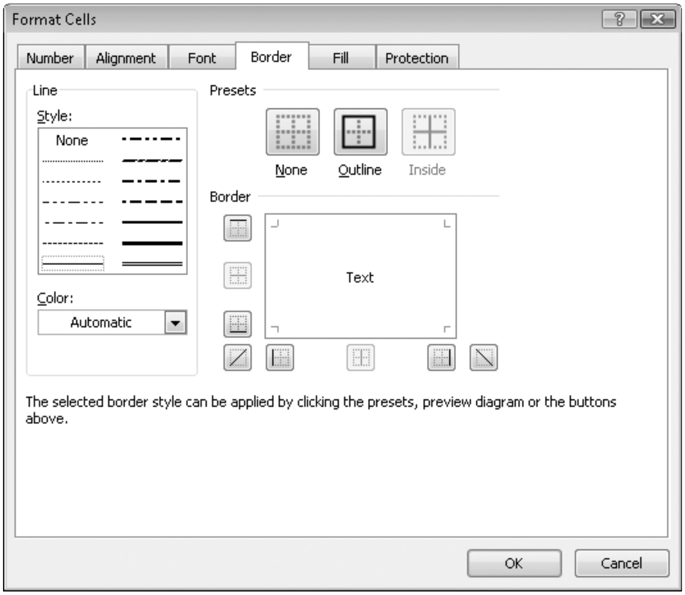
> **Tip** Deleting a cell's contents doesn't delete the cell's formatting. To delete a selected cell's formatting, on the Home tab, in the Editing group, click the Clear button, and then click Clear Formats.

Buttons in the Home tab's Font group that give you choices, such as the Font Color control, have an arrow at the right edge of the button. Clicking the arrow displays a list of options accessible for that control, such as the fonts available on your system or the colors you can assign to a cell.



Another way you can make a cell stand apart from its neighbors is to add a border around the cell. To place a border around one or more cells, select the cells and then choose the border type you want by selecting the type of border to apply from the Border list in the Font group. Excel 2007 does provide more options—to display the full

range of border types and styles, in the Border list, click More Borders. The Border tab of the Format Cells dialog box contains the full range of tools you can use to define your cells' borders.



Another way you can make a group of cells stand apart from its neighbors is to change its shading, or the color that fills the cells. On a worksheet that tracks total package volume for the past month, Jenny Lysaker could change the fill color of the cells holding her data labels to make the labels stand out even more than by changing the formatting of the text used to display the labels.

Tip You can display the most commonly used formatting controls by right-clicking a selected range. When you do, a Mini toolbar containing a subset of the Home tab formatting tools appears at the top of the shortcut menu.

If you want to change the attributes of every cell in a row or column, you can click the header of the row or column you want to format and then select your desired format.

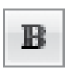
One task you can't perform using the tools on the Home tab is to change the standard font for a workbook, which is used in the Name box and on the formula bar. The standard font when you install Excel 2007 is Calibri, a simple font that is easy to read on a computer screen and on the printed page. If you want to choose another font, click the Microsoft Office Button, and then click Excel Options. On the Popular page of the Excel Options dialog box, set the values in the Use This Font and Font Size list boxes to pick your new display font.

> **Important** The new standard font doesn't take effect until you exit Excel 2007 and restart the program.

In this exercise, you emphasize a worksheet's title by changing the format of cell data, adding a border to a cell range, and then changing a cell range's fill color. After those tasks are complete, you change the default font for the workbook.

> **USE** the *VehicleMileSummary* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelAppearance* folder.
>
> **BE SURE TO** start Excel 2007 before beginning this exercise.
>
> **OPEN** the *VehicleMileSummary* workbook.

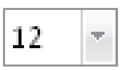
1. Click cell **D2**.



Bold

2. On the **Home** tab, in the **Font** group, click the **Bold** button.

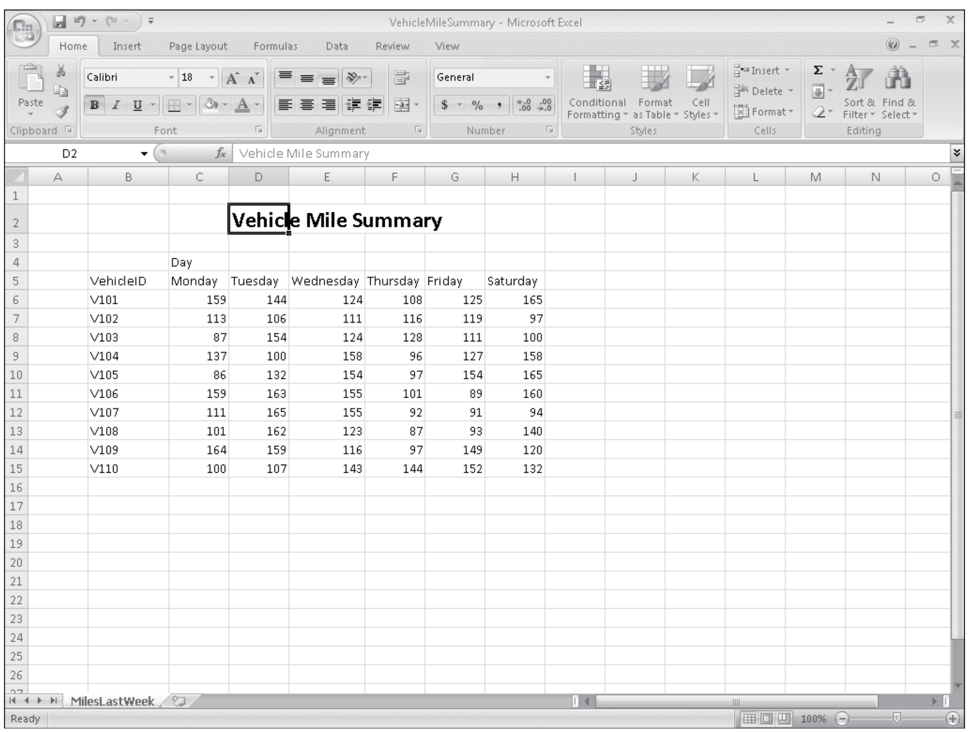
   Excel 2007 displays the cell's contents in bold type.



Font Size

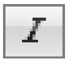
3. In the **Font** group, click the **Font Size** arrow, and then in the list, click **18**.

   Excel 2007 increases the size of the text in cell D2.



4. Select cells **B5** and **C4**.
5. On the **Home** tab, in the **Font** group, click the **Bold** button.

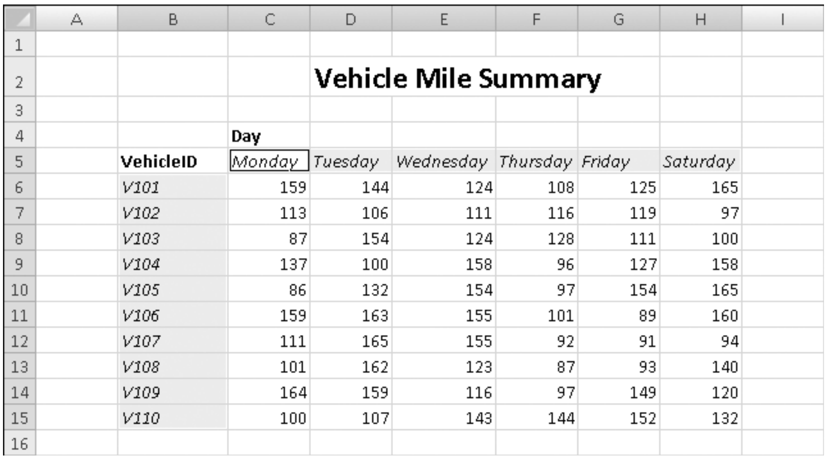
   Excel 2007 displays the cells' contents in bold type.
6. Select the cell ranges **B6:B15** and **C5:H5**.



Italic

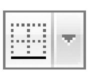
7. In the **Font** group, click the **Italic** button.

   Excel 2007 displays the cells' contents in italic type.



	A	B	C	D	E	F	G	H	I
1									
2				Vehicle Mile Summary					
3									
4			Day						
5		VehicleID	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
6		V101	159	144	124	108	125	165	
7		V102	113	106	111	116	119	97	
8		V103	87	154	124	128	111	100	
9		V104	137	100	158	96	127	158	
10		V105	86	132	154	97	154	165	
11		V106	159	163	155	101	89	160	
12		V107	111	165	155	92	91	94	
13		V108	101	162	123	87	93	140	
14		V109	164	159	116	97	149	120	
15		V110	100	107	143	144	152	132	
16									

8. Select the cell range **C6:H15**.



Border

9. In the **Font** group, click the **Border** arrow, and then in the list, click **Outside Borders**.

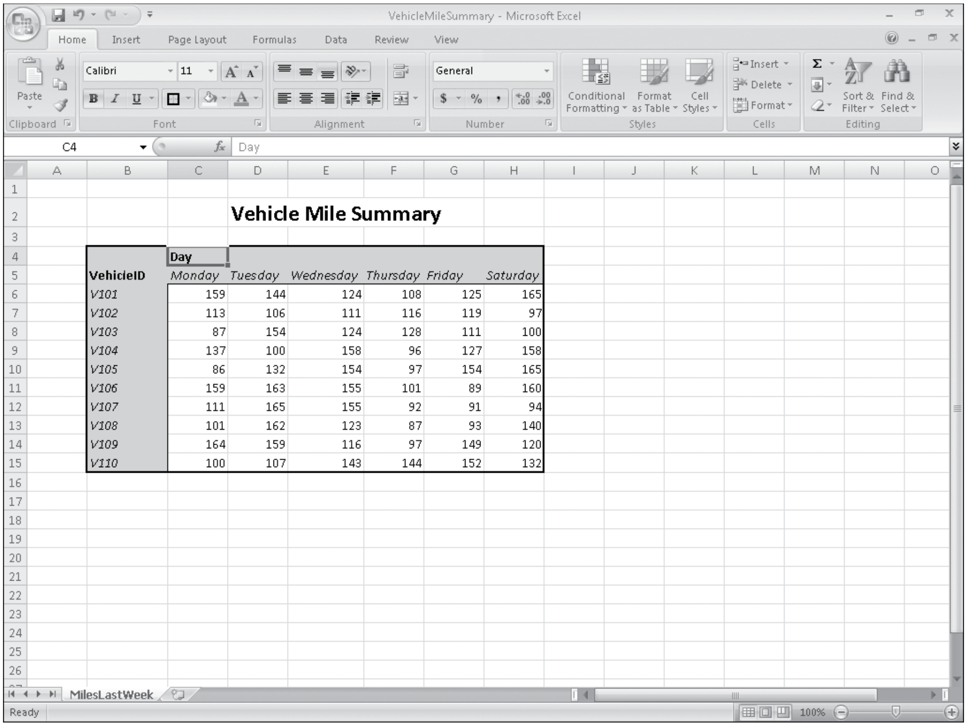
   Excel 2007 places a border around the outside edge of the selected cells.
10. Select the cell range **B4:H15**.
11. In the **Border** list, click **Thick Box Border**.

    Excel 2007 places a thick border around the outside edge of the selected cells.
12. Select the cell ranges **B4:B15** and **C4:H5**.

Fill Color

13. In the **Font** group, click the **Fill Color** arrow, and then in the **Standard Colors** section of the color palette, click the yellow button.

Excel 2007 changes the selected cells' background color to yellow.




Microsoft Office Button

14. Click the **Microsoft Office Button**, and then click **Excel Options**.

The Excel Options dialog box opens.

15. If necessary, click **Popular** to display the **Popular** tab.

16. In the **When creating new workbooks** section, in the **Use this font** list, click **Verdana**.

Verdana appears in the Use This Font field.

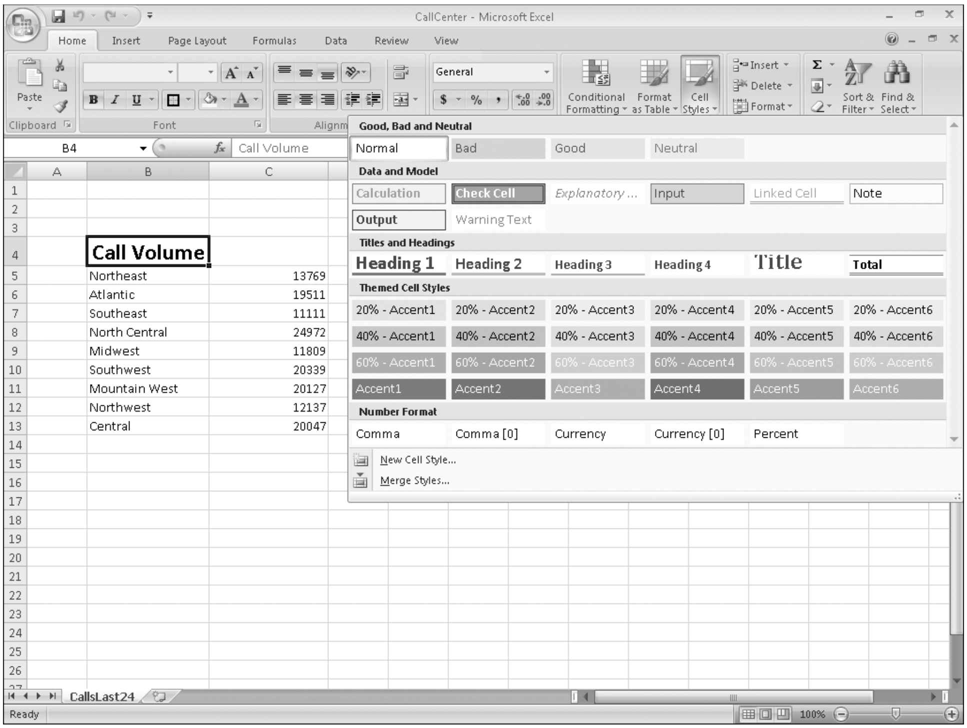
17. Click **Cancel**.

The Excel Options dialog box closes without saving your change.

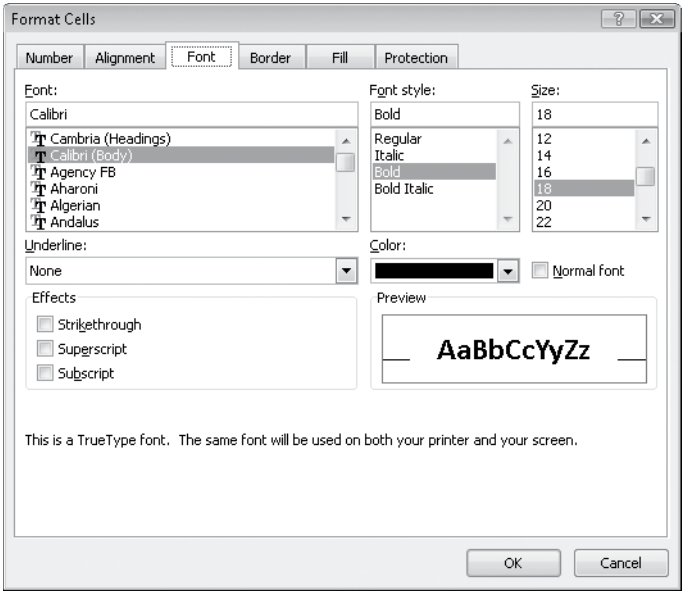
CLOSE the *VehicleMileSummary* workbook.

Defining Styles

As you work with Excel 2007, you will probably develop preferred formats for data labels, titles, and other worksheet elements. Instead of adding the format's characteristics one element at a time to the target cells, you can have Excel 2007 store the format and recall it as needed. You can find the predefined formats available to you by displaying the Home tab, and then in the Styles group, clicking Cell Styles.



Clicking a style from the Cell Styles gallery applies the style to the selected cells, but Excel 2007 goes a step beyond previous versions of the program by displaying a live preview of a format when you hover your mouse pointer on it. If none of the existing styles is what you want, you can create your own style by displaying the Cell Styles gallery and, at the bottom of the gallery, clicking New Cell Style to display the Style dialog box. In the Style dialog box, type the name of your new style in the Style Name field, and then click Format. The Format Cells dialog box opens.



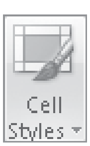
After you set the characteristics of your new style, click OK to make your style available in the Cell Styles gallery. If you ever want to delete a style, display the Cell Styles gallery, right-click the style, and then click Delete.

The Style dialog box is quite versatile, but it’s overkill if all you want to do is apply formatting changes you made to a cell to the contents of another cell. To do so, use the Format Painter button, found in the Home tab’s Clipboard group. Just click the cell that has the format you want to copy, click the Format Painter button, and select the target cells to have Excel 2007 apply the copied format to the target range.

In this exercise, you will create a style, apply the new style to a data label, and then use the Format Painter to apply the style to the contents of another cell.

USE the *HourlyExceptions* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelAppearance* folder.

OPEN the *HourlyExceptions* workbook.

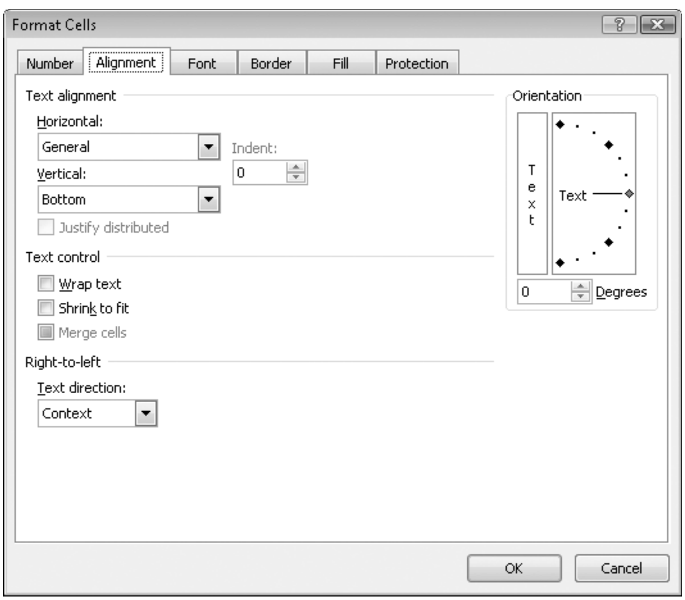


1. On the **Home** tab, in the **Styles** group, click **Cell Styles**, and then click **New Cell Style**.

The Style dialog box opens.

2. In the **Style name** field, type Crosstab Column Heading.
3. Click the **Format** button.

   The Format Cells dialog box opens.
4. Click the **Alignment** tab.



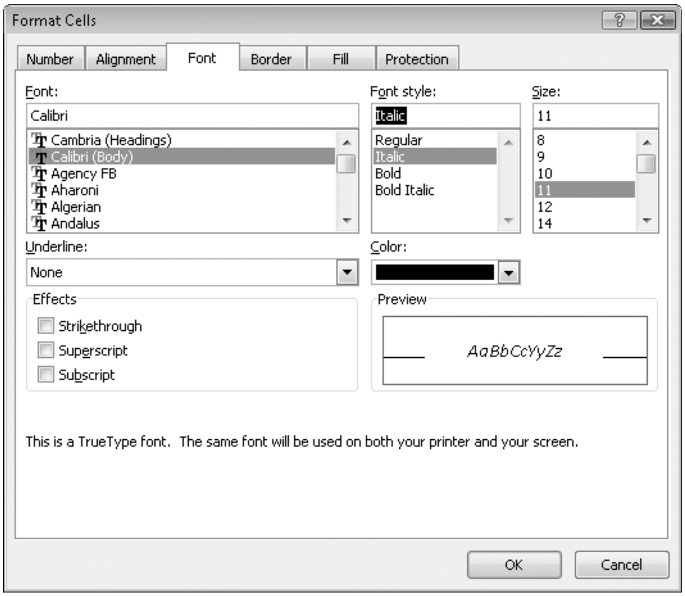
5. In the **Horizontal** list, click **Center**.

   Center appears in the Horizontal field.

6. Click the **Font** tab.

7. In the **Font style** list, click **Italic**.

   The text in the Preview pane appears in italicized text.



8. Click the **Number** tab.

   The Number tab of the Format Cells dialog box is displayed.

9. In the **Category** list, click **Time**.

   The available time formats appear.

10. In the **Type** pane, click **1:30 PM**.

11. Click **OK** to accept the default time format.

    The Format Cells dialog box closes, and your new style's definition appears in the Style dialog box.

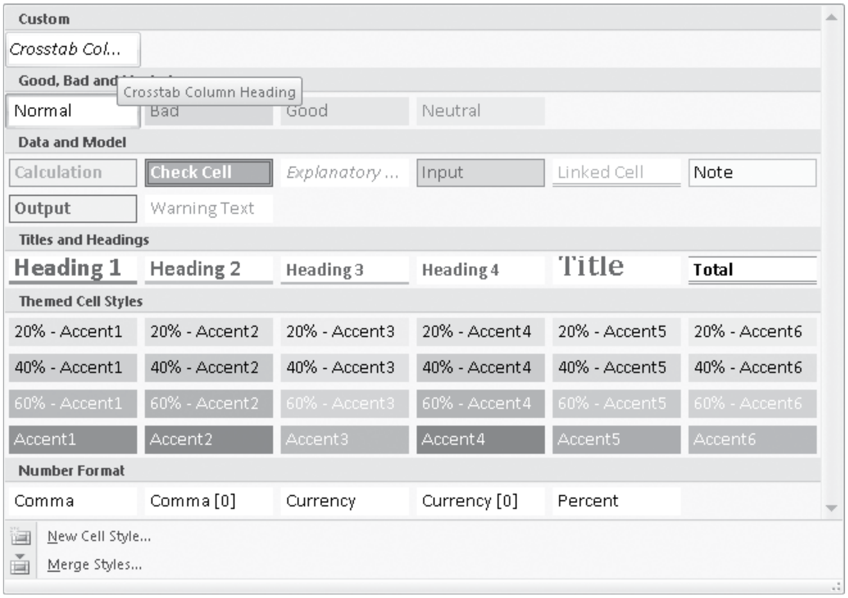
12. Click **OK**.

    The Style dialog box closes.

13. Select cells **C4:N4**.

14. On the **Home** tab, in the **Styles** group, click **Cell Styles**.

Your new style appears at the top of the gallery, in the Custom group.



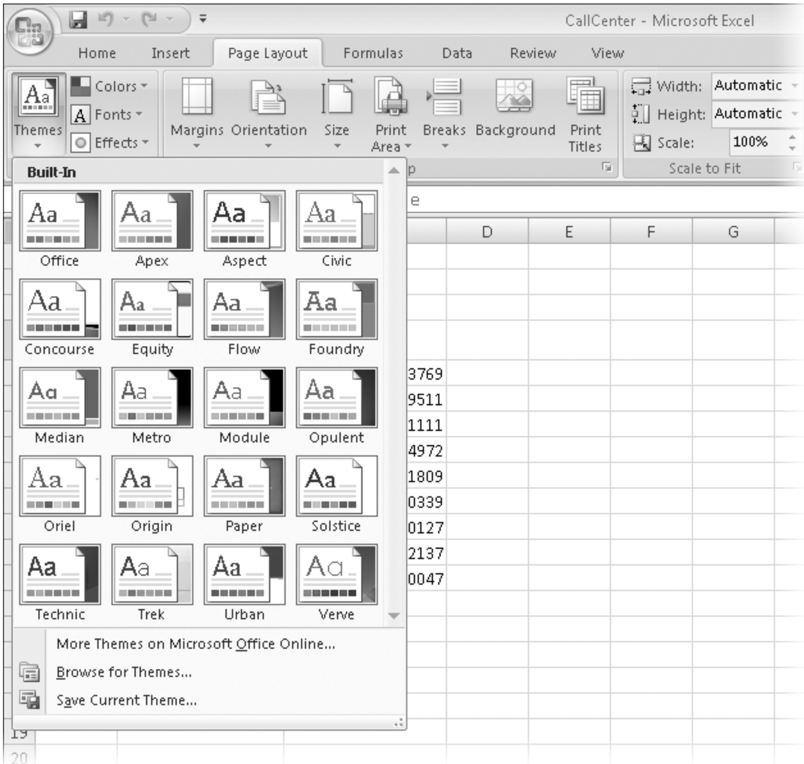
15. Click the **Crosstab Column Heading** style.

Excel 2007 applies your new style to the selected cells.

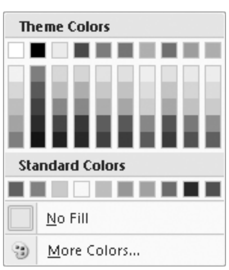
CLOSE the *HourlyExceptions* workbook.

Applying Workbook Themes and Table Styles

The 2007 Microsoft Office system includes powerful new design tools that enable you to create attractive, professional documents quickly. The Excel 2007 product team implemented the new design capabilities by defining workbook themes and table styles. A ***theme*** is a way to specify the fonts, colors, and graphic effects that appear in a workbook. Excel 2007 comes with many themes installed.



To apply an existing workbook theme, display the Page Layout tab. Then, in the Themes group, click Themes, and click the theme you want to apply to your workbook. By default, Excel 2007 applies the Office theme to your workbooks.

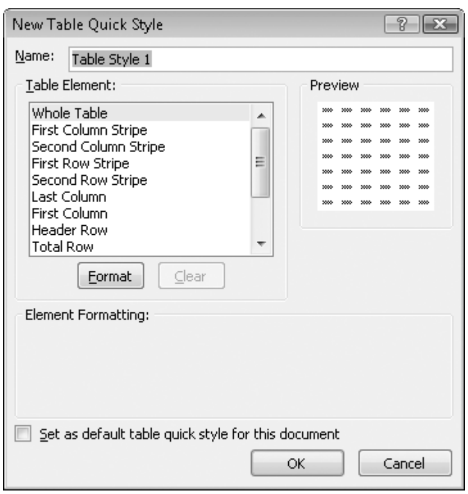


The theme colors appear in the top segment of the color palette—the standard colors and the More Colors link, which displays the Colors dialog box, appear at the bottom of the palette. If you format workbook elements using colors from the theme colors portion of the color palette, applying a different theme changes that object's colors.

You can change a theme's colors, fonts, and graphic effects by displaying the Page Layout tab, and in the Themes group, selecting new values from the Colors, Fonts, and Effects lists. To save your changes as a new theme, display the Page Layout tab, and in the Themes group, click Themes, and then click Save Current Theme. Use the controls in the dialog box that opens to record your theme for later use. Later, when you click the Themes button, your custom theme will appear at the top of the gallery.

Tip When you save a theme, you save it as an Office Theme file. You can apply the theme to Microsoft Office Word 2007 and Microsoft Office PowerPoint 2007 files as well.

Just as you can define and apply themes to entire workbooks, you can apply and define table styles. You select a table's initial style when you create it; to create a new style, display the Home tab, and in the Styles group, click Format As Table. In the Format As Table gallery, click New Table Style to display the New Table Quick Style dialog box.



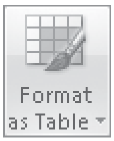
Type a name for the new style, select the first table element you want to format, and then click Format to display the Format Cells dialog box. Define the element's formatting, and then click OK. When the New Table Quick Style dialog box reopens, its Preview pane displays the overall table style and the Element Formatting section displays the selected element's appearance. Also, in the Table Element list, Excel 2007 displays the element's name in bold to indicate it has been changed. To make the new style the default for new tables created in the current workbook, select the Set As Default Table Quick Style For This Document check box. When you click OK, Excel 2007 saves the new table style.

See Also For more information about creating Excel tables, see "Defining a Table" in Chapter 6, "Working with Data and Data Tables."

In this exercise, you will create a new workbook theme, change a workbook's theme, create a new table style, and apply the new style to a table.

USE the *HourlyTracking* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelAppearance* folder.
OPEN the *HourlyTracking* workbook.

1. If necessary, click any cell in the table.



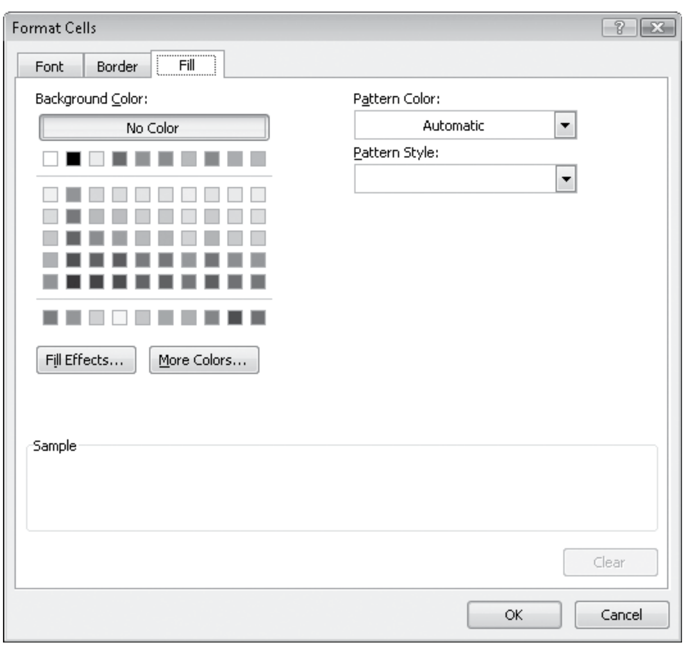
2. On the **Home** tab, in the **Styles** group, click **Format as Table**, and then click the style at the upper-left corner of the **Table Styles** gallery.

   Excel 2007 applies the style to the table.
3. On the **Home** tab, in the **Styles** group, click **Format as Table**, and then click **New Table Style**.

   The New Table Quick Style dialog box opens.
4. In the **Name** field, type **Exception Default**.
5. In the **Table Element** list, click **Header Row**.
6. Click **Format**.

   The Format Cells dialog box opens.
7. Click the **Fill** tab.

   The Fill tab appears.



8. In the first row of color squares, just below the **No Color** button, click the third square from the left.

   The new background color appears in the Sample pane of the dialog box.

9. Click **OK**.

   The Format Cells dialog box closes. When the New Table Quick Style dialog box reopens, the Header Row table element appears in bold, and the Preview pane's header row is shaded.

10. In the **Table Element** list, click **Second Row Stripe**, and then click **Format**.

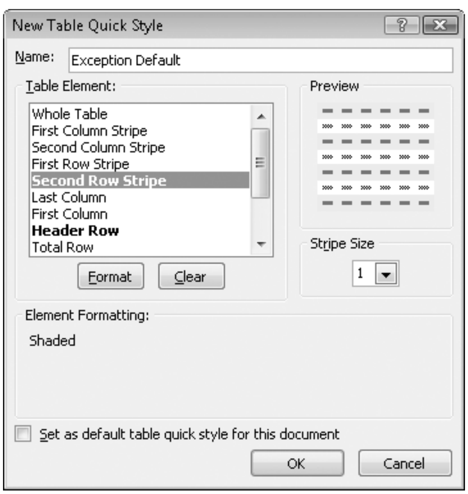
    The Format Cells dialog box opens.

11. Click the **No Color** button, and click the third square from the left again.

    The new background color appears in the Sample pane of the dialog box.

12. Click **OK**.

    The Format Cells dialog box closes. When the New Table Quick Style dialog box reopens, the Second Row Stripe table element appears in bold, and every second row is shaded in the Preview pane.



13. Click **OK**.

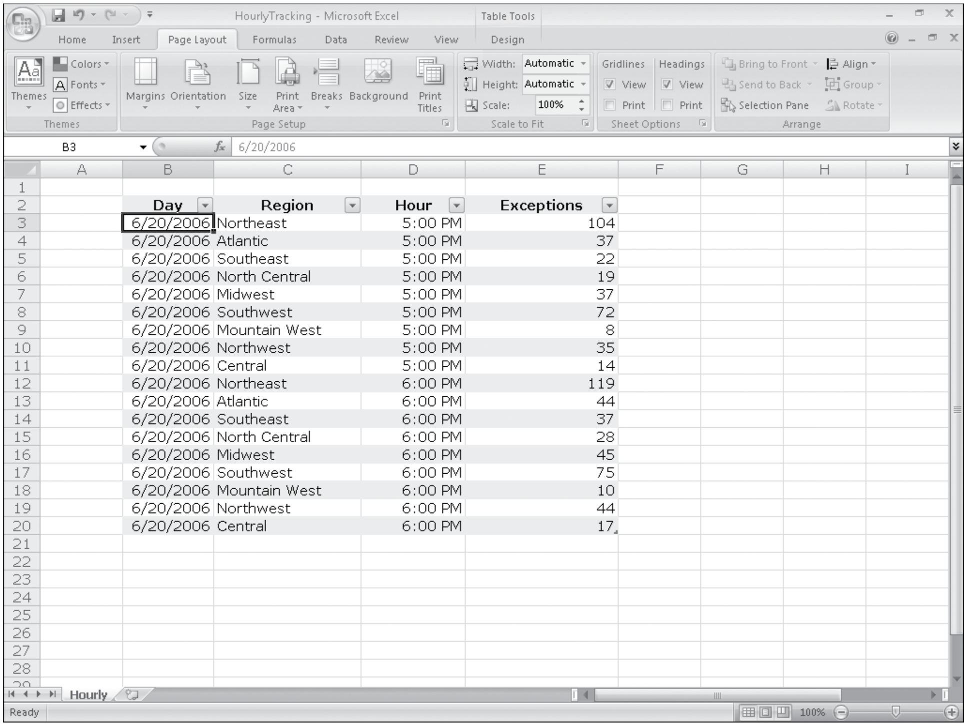
    The New Table Quick Style dialog box closes.

14. On the **Home** tab, in the **Styles** group, click **Format as Table**. In the gallery that appears, in the **Custom** section, click the new format.

    Excel 2007 applies the new format.

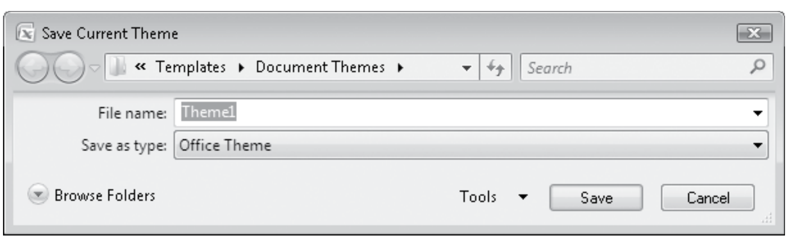
15. On the **Page Layout** tab, in the **Themes** group, click the **Fonts** arrow, and then in the list, click **Verdana**.

Excel 2007 changes the theme's font to Verdana.



16. In the **Themes** group, click the **Themes** button, and then click **Save Current Theme**.

The Save Current Theme dialog box opens.



17. In the **File name** field, type Verdana Office, and then click **Save**.

Excel 2007 saves your theme.

18. In the **Themes** group, click the **Themes** button, and then click **Origin**.

Excel 2007 applies the new theme to your workbook.

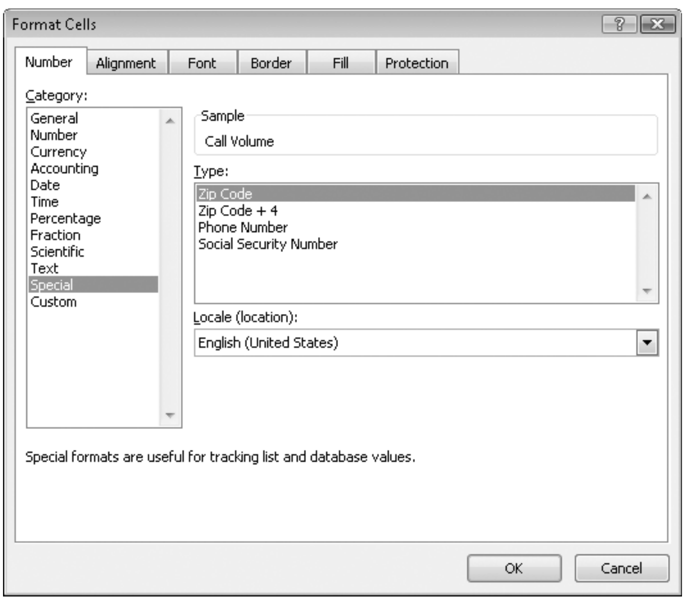
CLOSE the *HourlyTracking* workbook.

Making Numbers Easier to Read

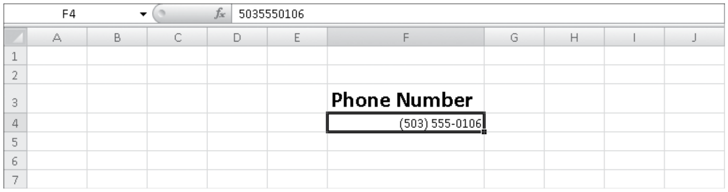
Changing the format of the cells in your worksheet can make your data much easier to read, both by setting data labels apart from the actual data and by adding borders to define the boundaries between labels and data even more clearly. Of course, using formatting options to change the font and appearance of a cell's contents doesn't help with idiosyncratic data types such as dates, phone numbers, or currency.

For example, consider U.S. phone numbers. These numbers are 10 digits long and have a 3-digit area code, a 3-digit exchange, and a 4-digit line number written in the form (###) ###-####. Although it's certainly possible to type a phone number with the expected formatting in a cell, it's much simpler to type a sequence of 10 digits and have Excel 2007 change the data's appearance.

You can tell Excel 2007 to expect a phone number in a cell by opening the Format Cells dialog box to the Number tab and displaying the formats available for the Special category.



Clicking Phone Number from the Type list tells Excel 2007 to format 10-digit numbers in the standard phone number format. As you can see by comparing the contents of the active cell and the contents of the formula bar in the next graphic, the underlying data isn't changed, just its appearance in the cell.



Troubleshooting If you type a nine-digit number in a field that expects a phone number, you won't see an error message; instead, you'll see a two-digit area code. For example, the number 425555012 would be displayed as (42) 555-5012. An 11-digit number would be displayed with a 4-digit area code.

Just as you can instruct Excel 2007 to expect a phone number in a cell, you can also have it expect a date or a currency amount. You can make those changes from the Format Cells dialog box by choosing either the Date category or the Currency category. The Date category enables you to pick the format for the date (and determine whether the date's appearance changes due to the Locale setting of the operating system on the computer viewing the workbook). In a similar vein, selecting the Currency category displays controls to set the number of places after the decimal point, the currency symbol to use, and the way in which Excel 2007 should display negative numbers.

Tip The new Excel 2007 user interface enables you to set the most common format changes by using the controls in the Home tab's Number group.

You can also create a custom numeric format to add a word or phrase to a number in a cell. For example, you can add the phrase per month to a cell with a formula that calculates average monthly sales for a year to ensure that you and your colleagues will recognize the figure as a monthly average. To create a custom number format, click the Home tab, and then click the Number Dialog Box Launcher to display the Format Cells dialog box. Then, if necessary, click the Number tab.

In the Category list, click Custom to display the available custom number formats in the Type list. You can then click the base format you want and modify it in the Type box. For example, clicking the 0.00 format causes Excel 2007 to format any number in a cell with two digits to the right of the decimal point.

Tip The zeros in the format indicate that the position in the format can accept any number as a valid value.

To customize the format, click in the Type box and add any symbols or text you want to the format. For example, typing a dollar ($) sign to the left of the existing format and then typing *"per month"* to the right of the existing format causes the number 1500 to be displayed as *$1500.00 per month*.

> **Important** You need to enclose any text in quotes so that Excel 2007 recognizes the text as a string to be displayed in the cell.

In this exercise, you assign date, phone number, and currency formats to ranges of cells in your worksheet. After assigning the formats, you test them by entering customer data.

> **USE** the *ExecutiveSearch* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelAppearance* folder.
>
> **OPEN** the *ExecutiveSearch* workbook.

1. Click cell **A3**.

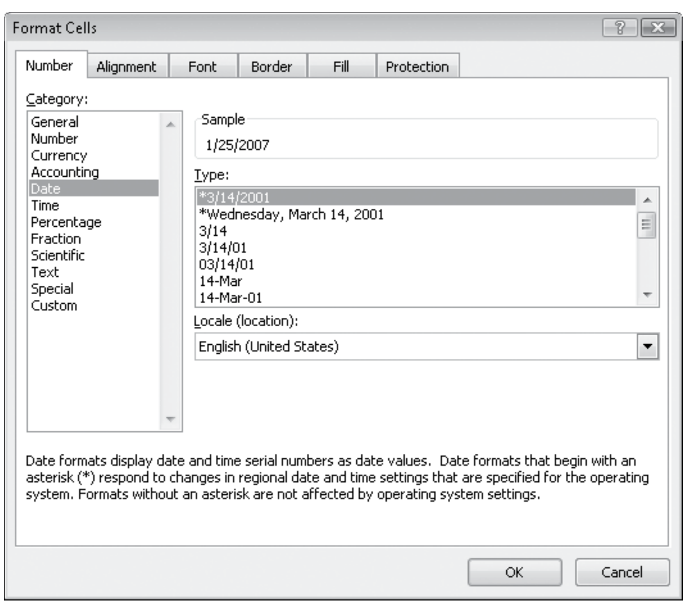
Dialog Box Launcher

2. On the **Home** tab, click the **Font** Dialog Box Launcher.

   The Format Cells dialog box opens.

3. If necessary, click the **Number** tab.
4. In the **Category** list, click **Date**.

   The Type list appears with a list of date formats.



5. In the **Type** list, click **3/14/01**.

> **Important** Be sure to click the format without the asterisk (*) in front of the sample date.

6. Click **OK** to assign the chosen format to the cell.
7. Click cell **G3**.
8. On the **Home** tab, click the **Font** Dialog Box Launcher.
9. If necessary, click the **Number** tab in the **Format Cells** dialog box.
10. In the **Category** list, click **Special**.

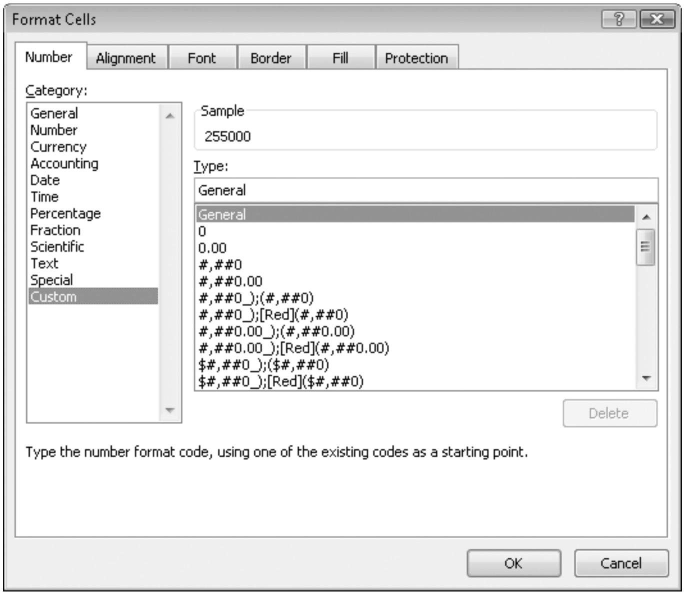
    The Type list appears with a list of special formats.

11. In the **Type** list, click **Phone Number**, and then click **OK**.

    The contents of the cell change to (425) 555-0102, matching the format you chose earlier, and the Format Cells dialog box closes.

12. Click cell **H3**.
13. Click the **Font** Dialog Box Launcher.
14. If necessary, click the **Number** tab in the **Format Cells** dialog box.
15. In the **Category** list, click **Custom**.

    The contents of the Type list are updated to reflect your choice.

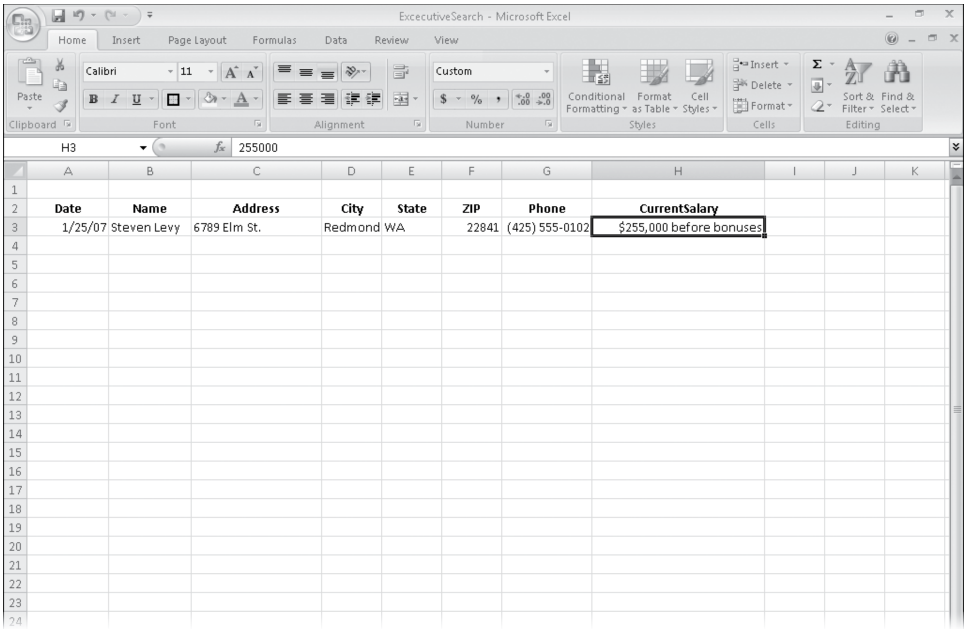


16. In the **Type** list, click the **#,##0** item.

    #,##0 appears in the Type box.

17. In the **Type** box, click to the left of the existing format, and type **$**. Then click to the right of the format, and type **"before bonuses"**.

18. Click **OK** to close the dialog box.



CLOSE the *ExecutiveSearch* workbook.

Changing the Appearance of Data Based on Its Value

Recording package volumes, vehicle miles, and other business data in a worksheet enables you to make important decisions about your operations. And as you saw earlier in this chapter, you can change the appearance of data labels and the worksheet itself to make interpreting your data easier.

Another way you can make your data easier to interpret is to have Excel 2007 change the appearance of your data based on its value. These formats are called ***conditional formats*** because the data must meet certain conditions to have a format applied to it.

For instance, if chief operating officer Jenny Lysaker wanted to highlight any Thursdays with higher-than-average weekday package volumes, she could define a conditional format that tests the value in the cell recording total sales, and that will change the format of the cell's contents when the condition is met.

In previous versions of Excel, you could have a maximum of three conditional formats. There's no such limit in Excel 2007; you may have as many conditional formats as you like. The other major limitation of conditional formats in Excel 2003 and earlier versions was that Excel stopped evaluating conditional formats as soon as it found one that applied to a cell. In other words, you couldn't have multiple conditions be true for the same cell! In Excel 2007, you can control whether Excel 2007 stops or continues after it discovers that a specific condition applies to a cell.

To create a conditional format, you select the cells to which you want to apply the format, display the Home tab, and then in the Styles group, click Conditional Formatting to display a menu of possible conditional formats. Excel 2007 enables you to create all the conditional formats available in previous versions of the program and offers many more conditional formats than were previously available. Prior to Excel 2007, you could create conditional formats to highlight cells that contained values meeting a certain condition. For example, you could highlight all cells that contain a value over 100, contain a date before 1/28/2007, or contain an order amount between $100 and $500. In Excel 2007, you can define conditional formats that change how the program displays data in cells that contain values above or below the average values of the related cells, that contain values near the top or bottom of the value range, or that contain values duplicated elsewhere in the selected range.

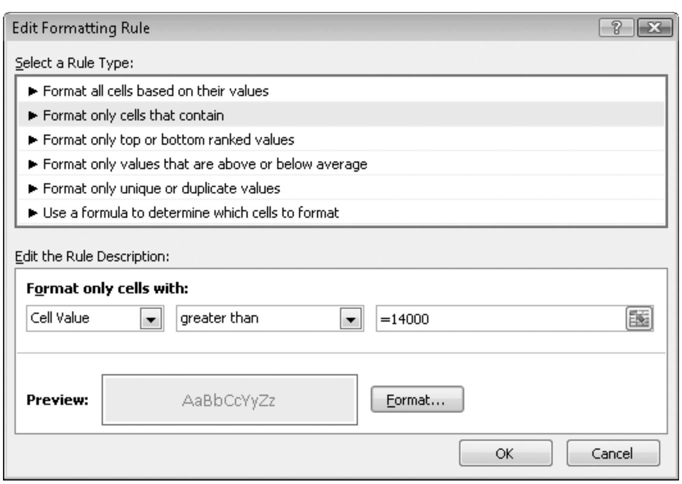
When you select which kind of condition to create, Excel 2007 displays a dialog box that contains fields and controls you can use to define your rule. To display all your rules, display the Home tab, and then in the Styles group, click Conditional Formatting. From the menu that appears, click Manage Rules to display the Conditional Formatting Rules Manager.

The Conditional Formatting Rules Manager, which is new in Excel 2007, enables you to control your conditional formats in the following ways:

- Creates a new rule by clicking the New Rule button
- Changes a rule by clicking the rule and then clicking the Edit Rule button
- Removes a rule by clicking the rule and then clicking the Delete Rule button
- Moves a rule up or down in the order by clicking the Move Up or Move Down button
- Controls whether Excel 2007 continues evaluating conditional formats after it finds a rule to apply by selecting or clearing a rule's Stop If True check box
- Saves any new rules and closes the Conditional Formatting Rules Manager by clicking OK
- Saves any new rules without closing the Conditional Formatting Rules Manager by clicking Apply
- Discards any unsaved changes by clicking Cancel

Tip Clicking the New Rule button in the Conditional Formatting Rules Manager opens the New Formatting Rule dialog box. The commands in the New Formatting Rule dialog box duplicate the options displayed when you click the Home tab's Conditional Formatting button.

After you create a rule, you can change the format applied if the rule is true by clicking the rule and then clicking the Edit Rule button to display the Edit Formatting Rule dialog box. In that dialog box, click the Format button to display the Format Cells dialog box. After you define your format, click OK.



> **Important** Excel 2007 doesn't check to make sure that your conditions are logically consistent, so you need to be sure that you enter your conditions correctly.

Excel 2007 also enables you to create three new types of conditional formats: data bars, color scales, and icon sets. Data bars summarize the relative magnitude of values in a cell range by extending a band of color across the cell.

Distribution Capacity	
Northeast	47%
Atlantic	75%
Southeast	39%
North Central	54%
Midwest	40%
Southwest	73%
Mountain West	51%
Northwest	69%
Central	41%

Color scales compare the relative magnitude of values in a cell range by applying colors from a two-color or three-color set to your cells. The intensity of a cell's color reflects the value's tendency toward the top or bottom of the values in the range.

Distribution Capacity	
Northeast	47%
Atlantic	75%
Southeast	39%
North Central	54%
Midwest	40%
Southwest	73%
Mountain West	51%
Northwest	69%
Central	41%

Icon sets are collections of three, four, or five images that Excel 2007 displays when certain rules are met.

Distribution Capacity	
Northeast	
Atlantic	
Southeast	
North Central	
Midwest	
Southwest	
Mountain West	
Northwest	
Central	

When you click a color scale or icon set in the Conditional Formatting Rule Manager and then click the Edit Rule button, you can control when Excel 2007 applies a color or icon to your data.

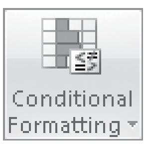
Important Be sure to not include cells that contain summary formulas in your conditionally formatted ranges. The values, which could be much higher or lower than your regular cell data, could throw off your formatting comparisons.

In this exercise, you create a series of conditional formats to change the appearance of data in worksheet cells displaying the package volume and delivery exception rates of a regional distribution center.

USE the *Dashboard* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelAppearance* folder.

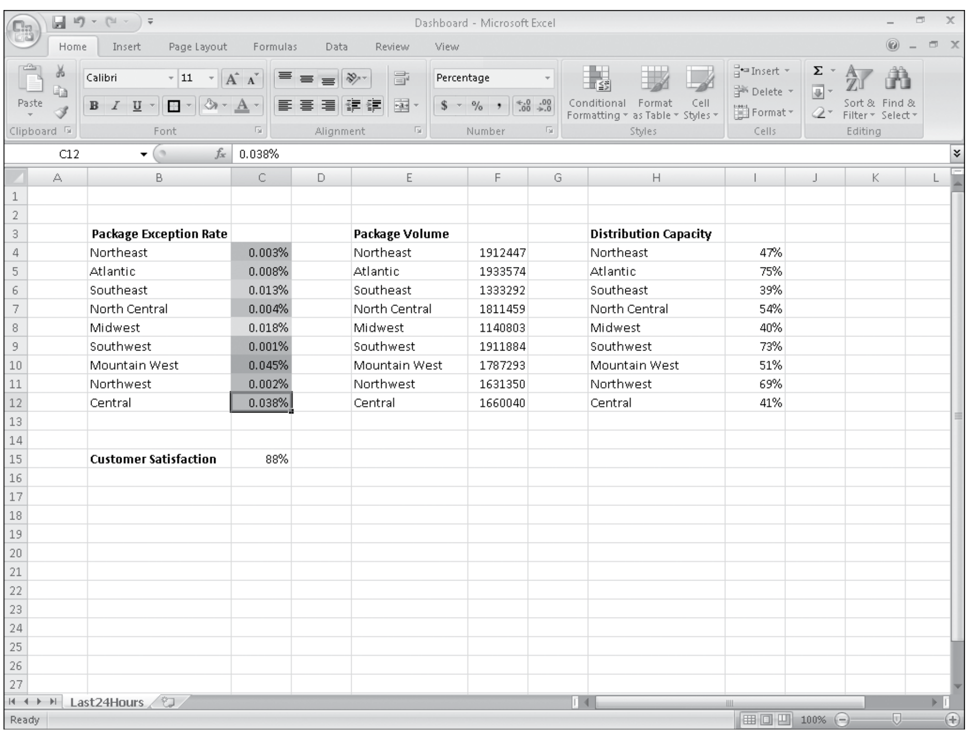
OPEN the *Dashboard* workbook.

1. Select cells **C4:C12**.



2. On the **Home** tab, in the **Styles** group, click **Conditional Formatting**. From the menu that appears, point to **Color Scales**, and then in the top row of the palette that appears, click the second pattern from the left.

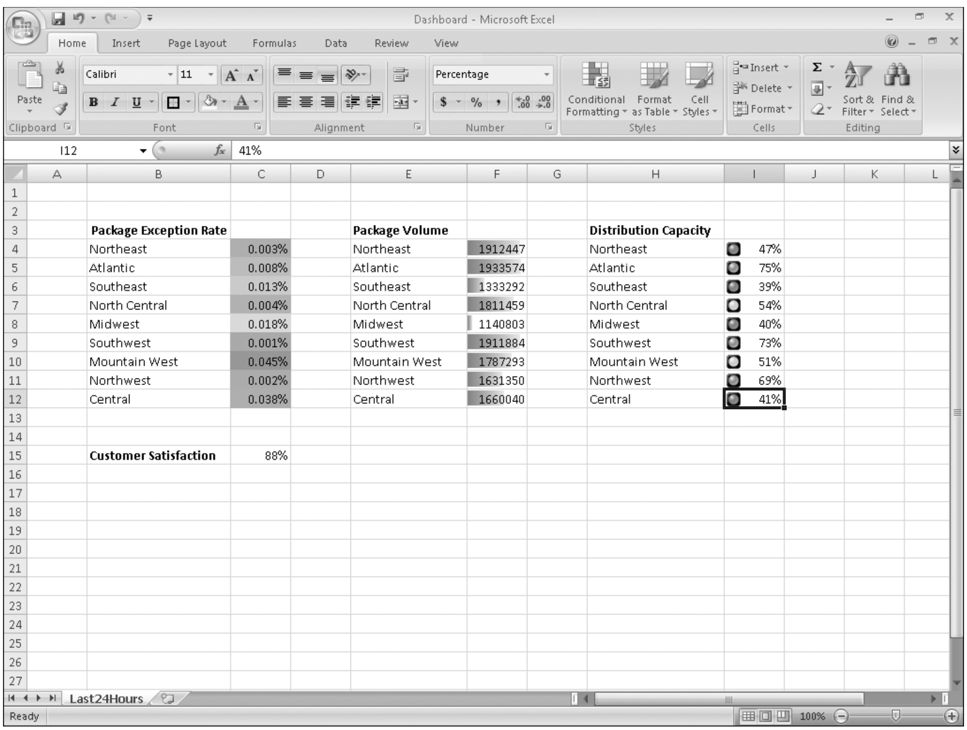
   Excel 2007 formats the selected range.



3. Select cells **F4:F12**.
4. On the **Home** tab, in the **Styles** group, click **Conditional Formatting**. From the menu that appears, point to **Data Bars**, and then click the light blue data bar format.

   Excel 2007 formats the selected range.
5. Select cells **I4:I12**.
6. On the **Home** tab, in the **Styles** group, click **Conditional Formatting**. On the menu that appears, point to **Icon Sets**, and then in the left-hand column of the list of formats that appears, click the three traffic lights.

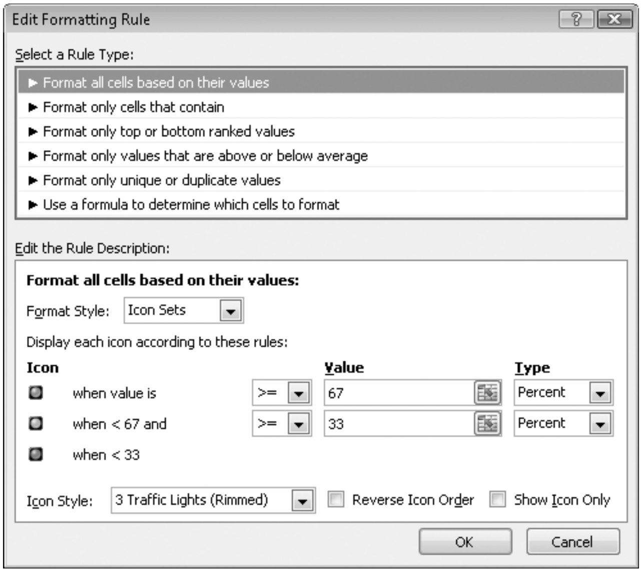
   Excel 2007 formats the selected cells.



7. With the range I4:I12 still selected, on the **Home** tab, in the **Styles** group, click **Conditional Formatting**, and then click **Manage Rules**.

   The Conditional Formatting Rules Manager opens.
8. Click the icon set rule, and then click **Edit Rule**.

The Edit Formatting Rule dialog box opens.



9. Select the **Reverse Icon Order** check box.

   Excel 2007 reconfigures the rules so the red light icon is at the top and the green light icon is at the bottom.

10. In the red light icon's row, in the **Type** list, click **Percent**.
11. In the red light icon's **Value** field, type 80.
12. In the yellow light icon's row, in the **Type** list, click **Percent**.
13. In the yellow light icon **Value** field, type 67.
14. Click **OK** twice to clear the **Edit Formatting Rule** dialog box and the **Conditional Formatting Rules Manager**.

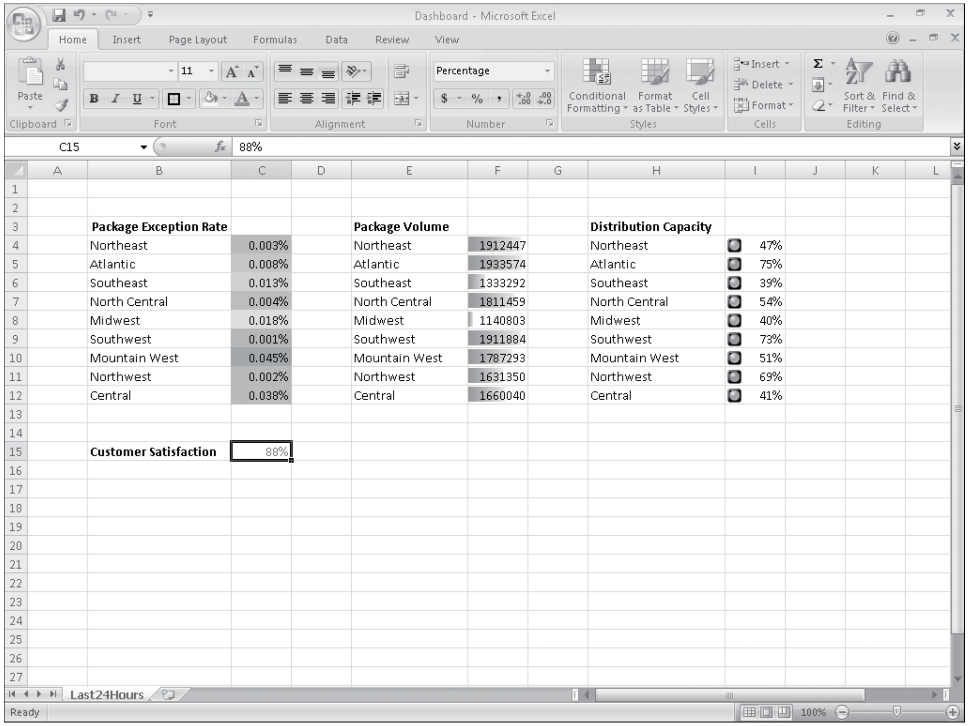
    Excel 2007 formats the selected cell range.

15. Click cell **C15**.
16. On the **Home** tab, in the **Styles** group, click **Conditional Formatting**. On the menu that appears, point to **Highlight Cells Rules**, and then click **Less Than**.

    The Less Than dialog box opens.

17. In the left field, type 96%.
18. In the **With** list, click **Red text**.
19. Click **OK**.

    The Less Than dialog box closes, and Excel 2007 displays the text in cell C15 in red.



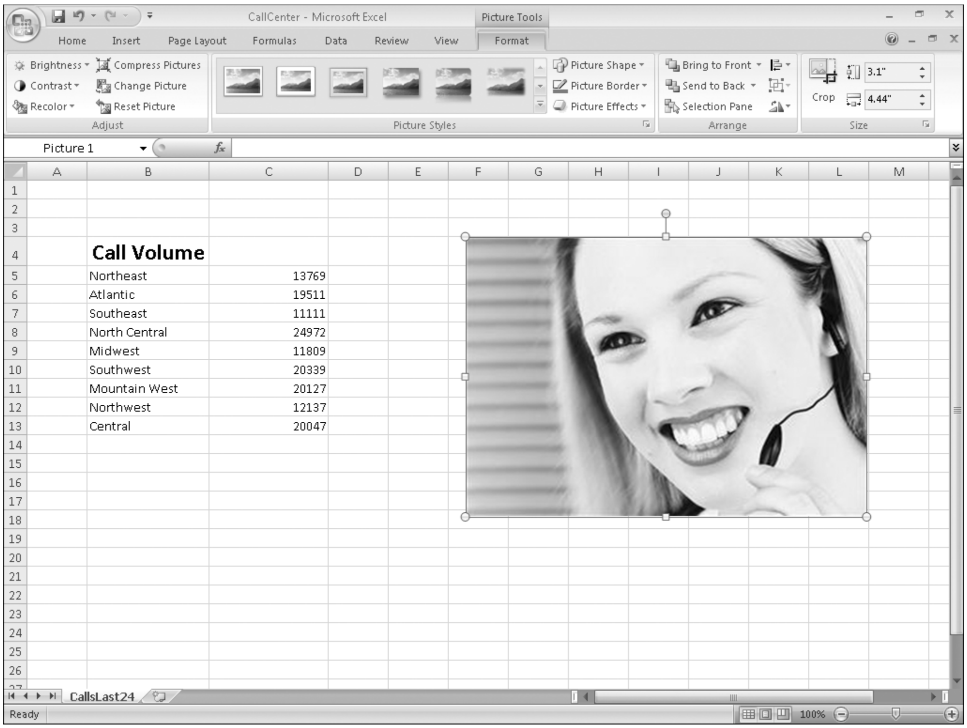
CLOSE the *Dashboard* workbook.

Adding Images to Documents

Establishing a strong corporate identity helps customers remember your organization and the products and services you offer. Setting aside the obvious need for sound management, two important physical attributes of a strong retail business are a well-conceived shop space and an eye-catching, easy-to-remember logo. After you or your graphic artist has created a logo, you should add the logo to all your documents, especially any that might be seen by your customers. Not only does the logo mark the documents as coming from your company but it also serves as an advertisement, encouraging anyone who sees your worksheets to call or visit your company.

One way to add a picture to a worksheet is to display the Insert tab, and then in the Illustrations group, click Picture. Clicking Picture displays the Insert Picture dialog box, which enables you to locate the picture you want to add from your hard disk. When you insert a picture, the Picture Tools contextual tab appears with the Format contextual tab right below it. You can use the tools on the Format contextual tab to change the picture's

contrast, brightness, and so on. The controls in the Picture Styles group enable you to place a border around the picture, change the picture's shape, or change a picture's effects (such as shadow, reflection, or rotation in three dimensions). Other tools, found in the Arrange and Size groups, enable you to rotate, reposition, and resize the picture.



You can also resize a picture by clicking it and then dragging one of the handles that appear on the graphic. If you accidentally resize a graphic by dragging a handle, just click the Undo button to remove your change. If you want to generate a repeating image in the background of a worksheet, forming a tiled pattern behind your worksheet's data, you can display the Page Layout tab, and then in the Page Setup group, click Background. In the Sheet Background dialog box, click the image that you want to serve as the background pattern for your worksheet, and click OK.

Tip To remove a background image from a worksheet, display the Page Layout tab, and then in the Page Setup group, click Delete Background.

In this exercise, you add an image to an existing worksheet, change the graphic's location on the worksheet, reduce the size of the graphic, change the image's brightness and contrast, rotate and crop the image, delete the image, and then set the image as a repeating background for the worksheet.

USE the *CallCenter* workbook and the *callcenter* and *acbluprt* images. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\ExcelAppearance* folder.

OPEN the *CallCenter* workbook.

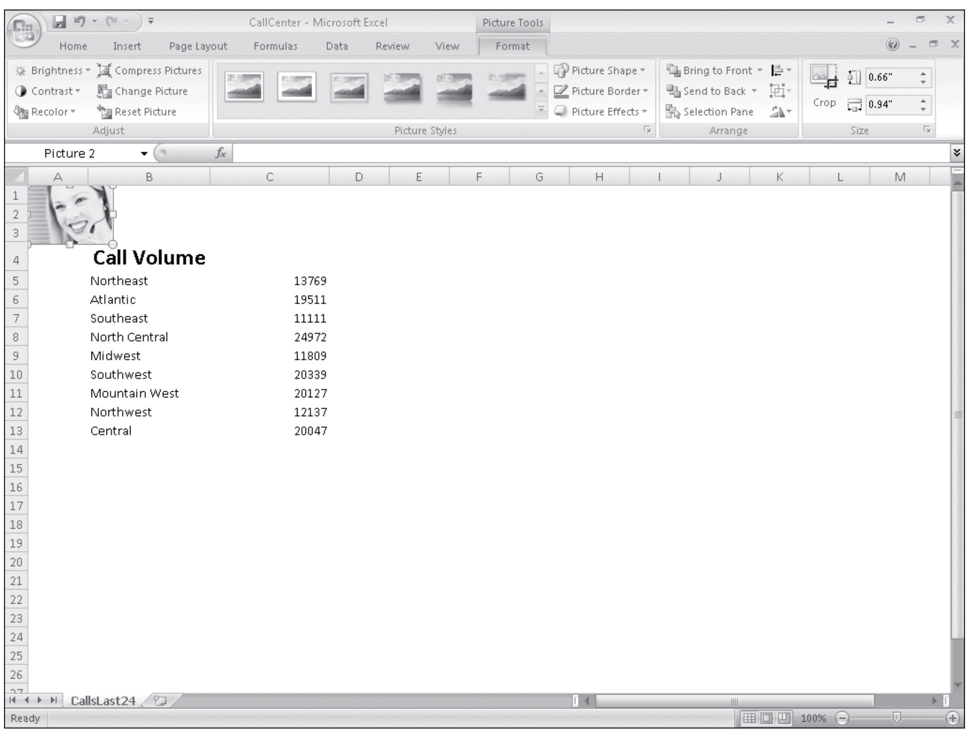
1. On the **Insert** tab, click **Picture**.

   The Insert Picture dialog box opens.

2. Browse to the *Documents\Microsoft Press\2007OfficeSBS\ExcelAppearance* folder, and then double-click *callcenter.jpg*.

   The image appears on your worksheet.

3. Move the image to the upper-left corner of the worksheet, grab the handle at the lower-right corner of the image, and drag it up and to the left until it no longer obscures the Call Volume label.

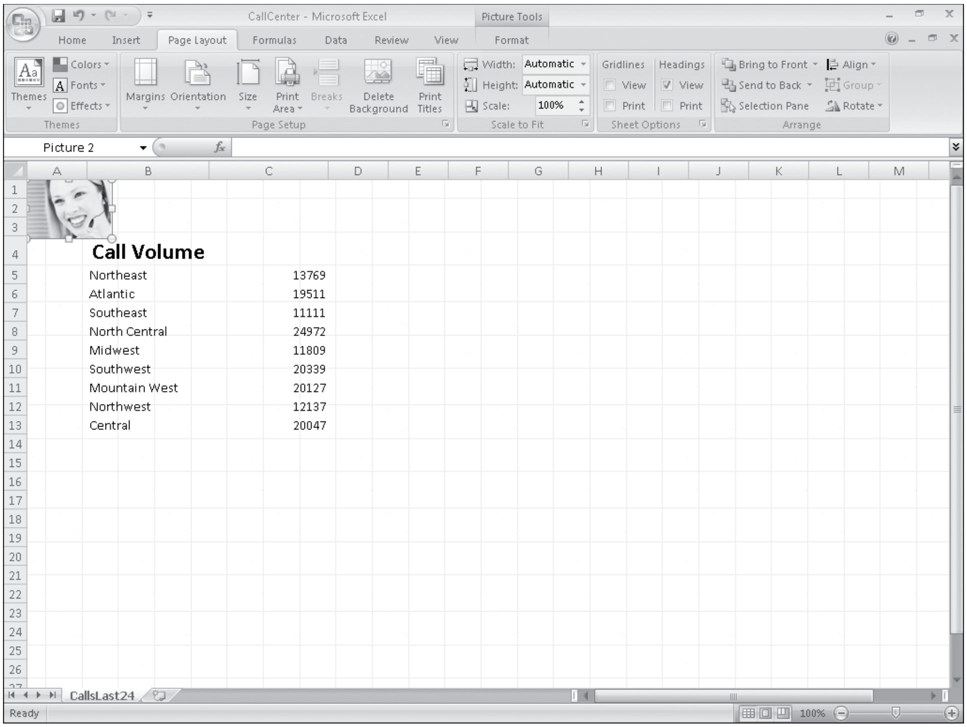


4. On the **Page Layout** tab, in the **Page Setup** group, click **Background**.

   The Sheet Background dialog box opens.

5. Browse to the *Documents\Microsoft Press\2007OfficeSBS\ExcelAppearance* folder, and then double-click *acbluprt.jpg*.

   Excel 2007 repeats the image to form a background pattern.



6. On the **Page Layout** tab, in the **Page Setup** group, click **Delete Background**.

   Excel 2007 removes the background image.

CLOSE the *CallCenter* workbook, and then exit Excel.

Key Points

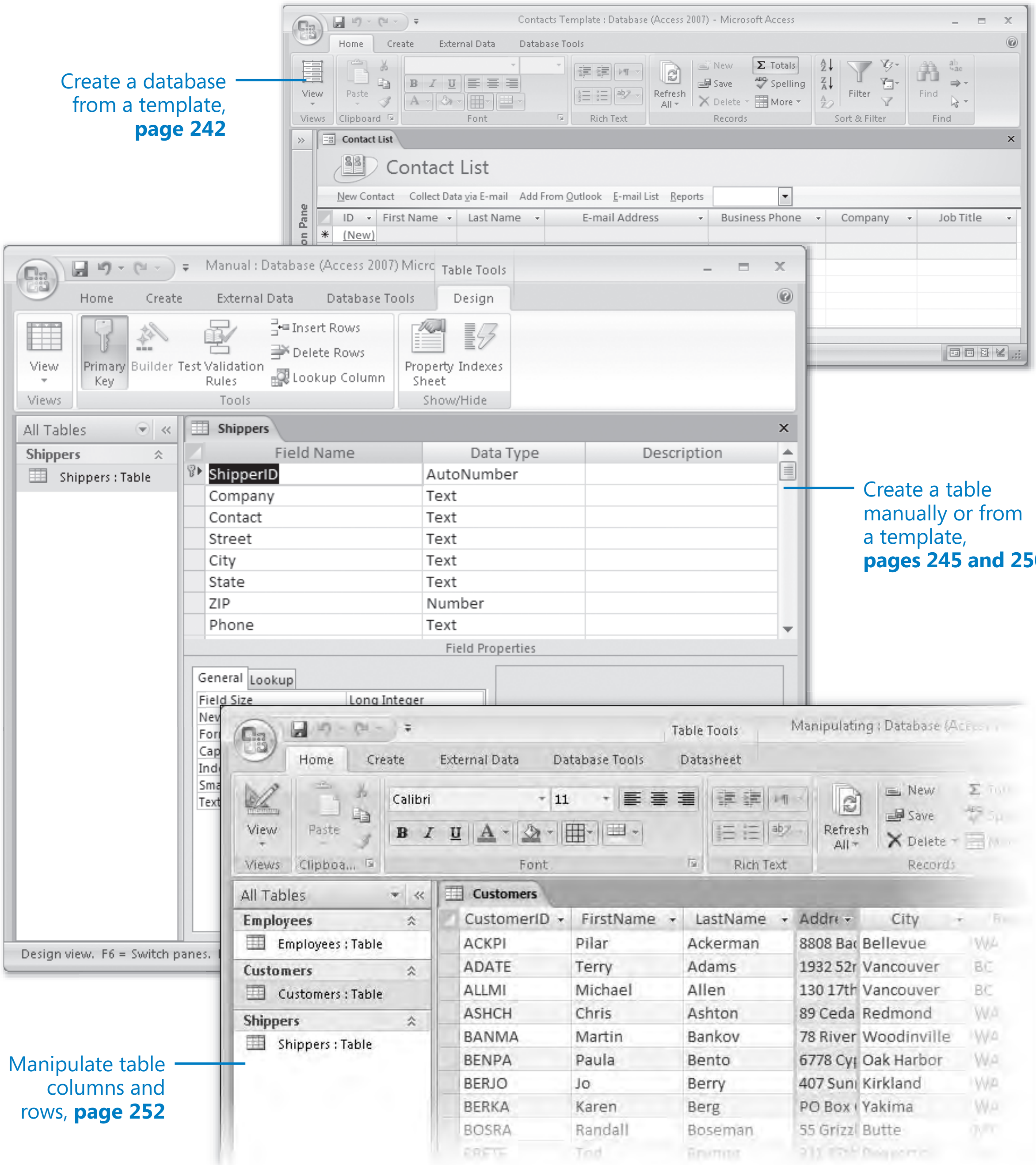
- If you don't like the default font in which Excel 2007 displays your data, you can change it.
- You can use cell formatting, including borders, alignment, and fill colors, to emphasize certain cells in your worksheets. This emphasis is particularly useful for making column and row labels stand out from the data.
- Excel 2007 comes with a number of existing styles that enable you to change the appearance of individual cells. You can also create new styles to make formatting your workbooks easier.
- If you want to apply the formatting from one cell to another cell, use the Format Painter to copy the format quickly.
- There are quite a few built-in document themes and table formats you can apply to groups of cells. If you see one you like, use it and save yourself lots of formatting time.
- Conditional formats enable you to set rules so that Excel 2007 changes the appearance of a cell's contents based on its value.
- Adding images can make your worksheets more visually appealing and make your data easier to understand.

Part III

Microsoft Office Access 2007

Chapter at a Glance

Create a database from a template, **page 242**



Create a table manually or from a template, **pages 245 and 250**

Manipulate table columns and rows, **page 252**

9 Creating a Database

In this chapter, you will learn to:

- ✔ Create a database from a template.
- ✔ Create a table manually or from a template.
- ✔ Manipulate table columns and rows.

Creating the structure for a database is easy. But an empty database is no more useful than an empty document or worksheet. It is only when you fill, or **populate**, a database with data in tables that it starts to serve a purpose. As you add queries, forms, and reports, it becomes easier to use. If you customize it with a switchboard or custom categories and groups, it moves into the realm of being a **database application**.

Not every database has to be refined to the point that it can be classified as an application. Databases that only you or a few experienced database users will work with can remain fairly rough-hewn. But if you expect an administrative assistant to enter data or your company's executives to generate their own reports, spending a little extra time in the beginning to create a solid database application will save a lot of work later. Otherwise, you'll find yourself continually repairing damaged files or walking people through seemingly easy tasks.

Microsoft Office Access 2007 takes a lot of the difficult and mundane work out of creating and customizing a database by providing database applications in the form of **templates** that you modify and fill with your own information. Access 2007 also provides templates for common types of tables, and improved ways to import content from other applications to instantly create and populate tables. Using one of these methods to create something that is similar to what you need and then modifying your creation is generally easier than creating the same thing manually. If none of the templates or import methods match your needs, you can create tables manually—another process that has been improved in this version of Access.

In this chapter, you will create a database from a template, create a table manually, and create a table from a template. Then, you'll adjust the display of a data table to fit your needs. By the end of this chapter, you will have a database containing three tables that will serve as the foundation for many of the exercises in this book.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Creating a Database from a Template

A few years ago (the distant past in computer time), creating a database structure involved first analyzing your needs and then laying out the database design on paper. You would decide what information you needed to track and how to store it in the database. Creating the database structure could be a lot of work, and after you created it and entered data, making changes could be difficult. Templates have changed this process. Committing yourself to a particular database structure is no longer the big decision it once was. By using pre-packaged templates, you can create a dozen database applications in less time than it used to take to sketch the design of one on paper. Access templates might not create exactly the database application you want, but they can quickly create something very close that you can tweak to fit your needs.

In this exercise, you will open and explore a database application based on the Contacts template. This template is typical of those provided with Microsoft Office Access 2007, in that it looks nice and demonstrates a lot of the neat things you can do in a database, such as adding command buttons and embedded macros to link to other Office applications or Windows commands. Due to the complexity of these templates, you probably shouldn't try to modify them until you are comfortable working with simpler tables and forms in Design view. There are no practice files for this exercise.

BE SURE TO start Access before beginning this exercise.

1. In the **Template Categories** list, click **Local Templates**.

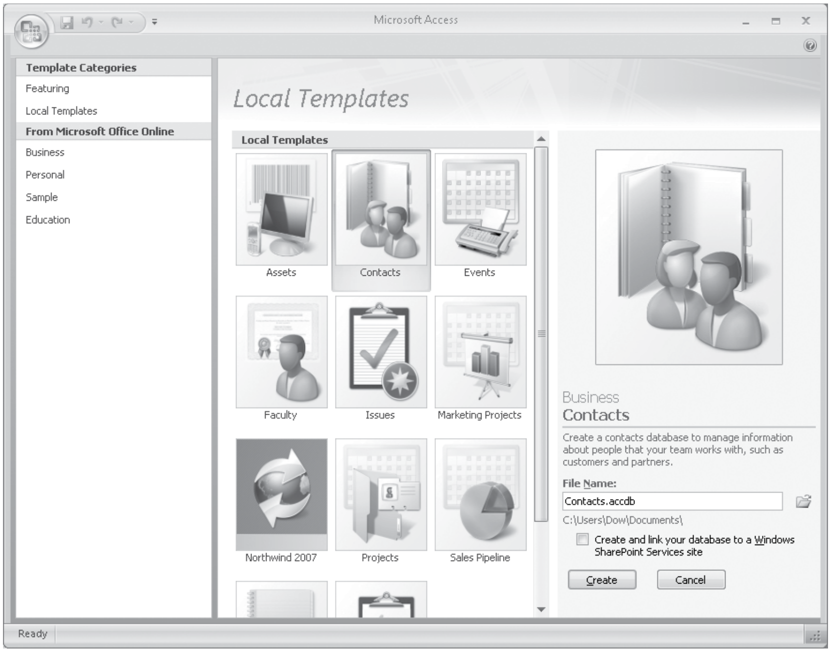
   Tip When you are connected to the Internet, you can find additional templates and other resources in the From Office Online area of the Getting Started With Microsoft Office Access screen.

   Access displays a list of the templates that are available from the default template location (*C:\Program Files\Microsoft Office\Templates\1033\Access*).

   Tip When you point to a template icon, Access displays a description of the database in a pop-up window, called a ScreenTip. For more information about these templates, search Access Help for *Guide to the Access 2007 templates*.

2. Click the **Contacts** template icon.

   A description of the template appears on the right side of the program window, along with a box in which you can assign a name to the database and a folder button to browse to the place you want to store the database.

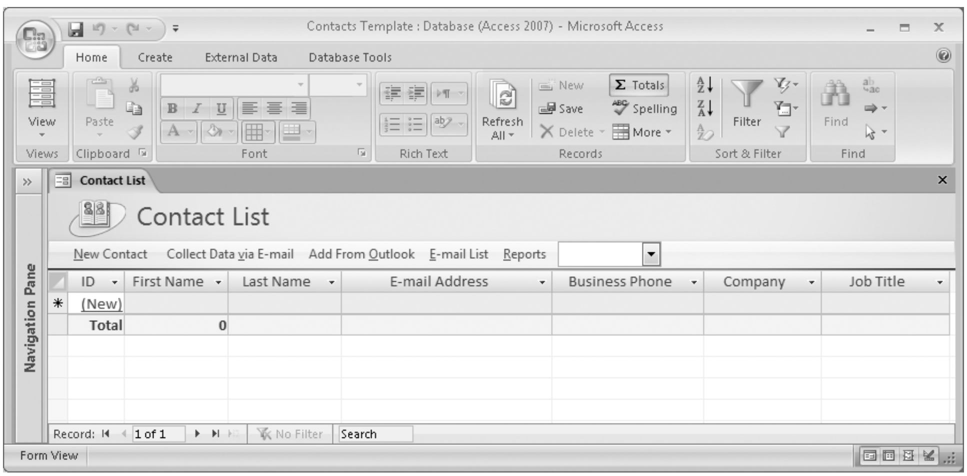


3. In the **File Name** box, type Contacts Template, and note the default path.

> **Tip** Naming conventions for Access database files follow those for Windows files. A file name, including its path, can contain up to 260 characters, including spaces, but creating a file name that long is not recommended. File names cannot contain the following characters: \ / : * ? " < > |.
>
> The extension for an Access 2007 database file is *.accdb*, instead of the *.mdb* extension used for previous versions. For information about the differences between the two formats, search Access Help for *accdb*.

4. Click **Create**.

   Access briefly displays a progress bar, and then your new database opens.



5. If the **Navigation Pane** is closed, press F11 to open it.

   Notice that the Navigation Pane displays a custom category named *Contacts*, and a custom group named *Supporting Objects*.

   Notice the commands above the column headers. These commands are examples of the embedded macros that make this an application rather than a database.

> **Tip** Access stores embedded macros as properties of the object to which they are attached, rather than as macros common to all database objects. Any modifications you make to an embedded macro are specific to the active object.
>
> Restricting the scope of a macro by embedding it provides the added comfort of knowing that Access will not consider its actions "unsafe" and therefore will not block it.

6. Enter your own contact information into the first record.
7. Explore the *Contacts Template* database on your own.

CLOSE the *Contacts Template* database.
BE SURE TO delete the *Contacts Template* database from the default storage location if you don't want to use it again.

Tip Access creates new databases in your *Documents* folder. You can change the location as you create each database, or change the default save location. To do so, click the Microsoft Office Button, click Access Options, and then on the Popular page, in the Creating Databases area, click the Browse button. In the Default Database Path dialog box, browse to the folder you want to select as the default database storage folder. Then click OK in each of the open dialog boxes.

Creating a Table Manually

In the previous exercise, you created a contact management database application based on an Access 2007 template. The database had all the tables, forms, reports, and code needed to import, store, and use basic information about people. But suppose you need to store different types of information for different types of contacts. For example, you might want to maintain different types of information about employees, customers, and suppliers. In addition to the standard information—such as names, addresses, and phone numbers—you might want to track these other kinds of information:

- Employee Social Security numbers, dates of hire, marital status, deductions, and pay rates
- Customer orders and account status
- Supplier contacts, current order status, and discounts

You could start with the template, add a lot of extra fields to the Contacts table, and then fill in just the ones you want for each contact type; but cramming all this information into one table would soon get pretty messy. In this instance, it's better to manually create a database that includes one table for each contact type: employee, customer, and supplier.

> **Important** With most computer programs, it is important to save your work frequently to avoid losing it if your computer crashes or the power goes out. With Access, it is not only *not* important to save your data, it is *not possible* to manually save it. When you move the insertion point out of a record after entering or editing information, Access saves that record. This means that you don't have to worry about losing your changes, but you do have to remember that most data entry changes you make are permanent and can be undone only by editing the record again.
>
> Note, however, that changes to properties and layout are not saved automatically. If you create a new table, form, or report, or modify the properties or layout of an existing one, you will be prompted to save the changes before closing the object or the database.

See Also For information about ways of controlling table content, see Chapter 12, "Keeping Your Information Accurate."

In this exercise, you will open a blank database, create a table, manually add a record, and import some records. There are no practice files for this exercise.

BE SURE TO start Access before beginning this exercise.

1. On the **Getting Started with Microsoft Access** page, in the **New Blank Database** area, click **Blank Database**.

   Access displays information about the selected template on the right side of the program window.

Browse for a location

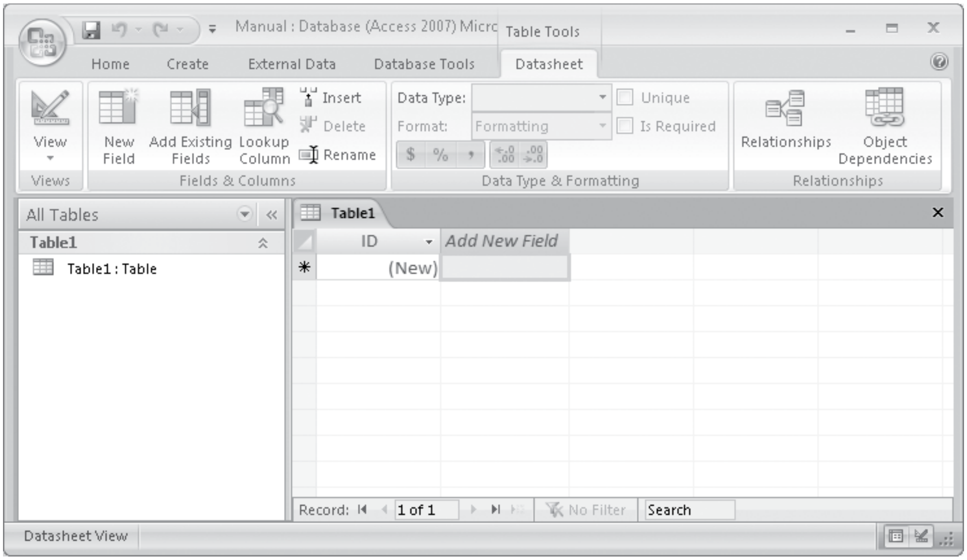
2. In the **File Name** box, type Manual, click the **Browse for a location** button, and browse to the *Documents\Microsoft Press\2007OfficeSBS\AccessCreating* folder. Then click **OK**.

   > **Important** You can't create a blank database without saving it. If you don't provide a path and file name in the File Name box, Access saves the file in a default location and with a sequentially numbered default name. The usual location is in the *Documents* folder, and the name is in the format *Database1.accdb*.

3. Click **Create** to create the blank database in the specified location.

   The database opens, displaying a new blank table named *Table1*, in a group named *Table1*.

Tip Notice that the first column is titled ID and the second is titled Add New Field. Access automatically creates the ID field—you can delete it if you don't need it. The ability to add fields to a table by simply typing data in the first row is new with Access 2007. As you enter information in the cells, Access adds fields to the table and guesses at the data type and other properties.



Troubleshooting At press time, there was an unresolved bug in the process for adding the first record to a table. The result of the bug is that if you don't save the first record after adding the first field, and before adding the second field, then Access increments the record ID value for each field you add to the first record. If you add seven fields, Access assigns the value "7" to the ID field of the first record. To avoid this bug, simply click the record selector after adding a value to the first field of the first record in the table. This will save the record, and Access will assign a value of "1" to the ID field. Then continue adding the rest of your fields.

4. Click in the empty cell below **Add New Field**, type Big Things Freight, and then press Tab to move to the next cell.

   Access automatically assigns the value "1" to the ID field, assigns the name "Field1" to the first column, and moves the Add New Field heading to the third column. The Unsaved Record icon (two dots followed by a pencil) in the Record Selector box at the left of the record indicates that this record has not yet been saved.

5. Type the following information into the next six cells, pressing Tab after each entry:

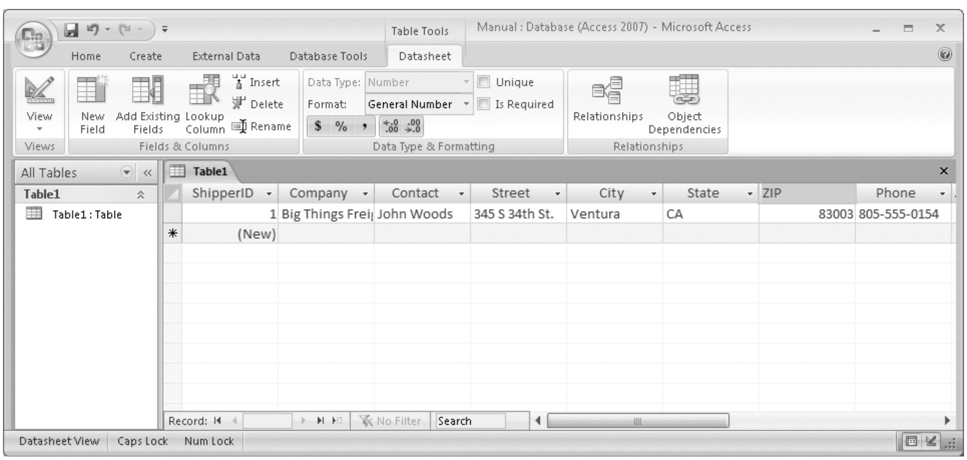
   John Woods
   345 S. 34th St.
   Ventura
   CA
   83003
   805 555-0154

   As the insertion point moves out of each cell, its name changes to *Field* followed by a number.

6. Double-click the **ID** column name, and then type **ShipperID** to rename it.

7. Repeat step 6 for the other columns, changing the column names to the following:

Field1	**Company**	**Field5**	**State**
Field2	**Contact**	**Field6**	**ZIP**
Field3	**Street**	**Field7**	**Phone**
Field4	**City**		



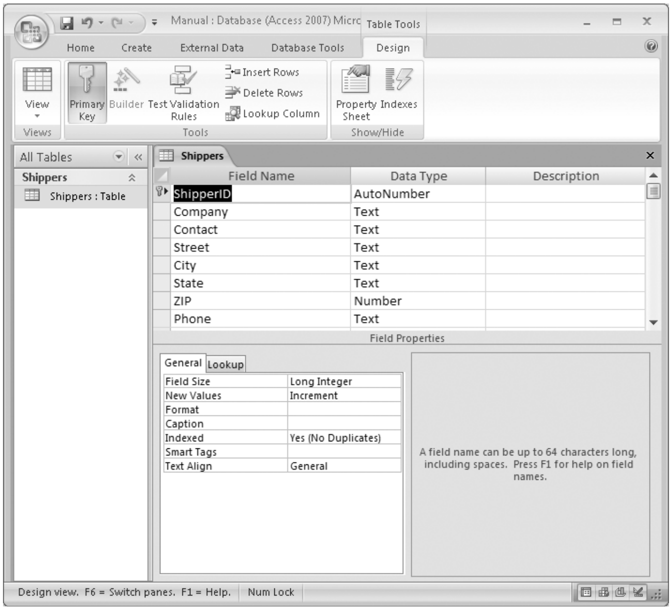

Design View

8. On the **View** toolbar in the lower-right corner of the program window, click the **Design View** button to switch to Design view.

> **Tip** The buttons displayed on the View toolbar change depending on the type of object that is active. They are a handy way to switch views if the pointer is near the bottom of the window. Most instructions to switch views in this book refer to the View button in the Views group on the Home tab.

Access prompts you to provide a name, because you need to save the table before changing to Design view.

9. In the **Save As** dialog box, type **Shippers**, and then click **OK**.



In Design view, the top portion of the window contains a list of the table's fields. The Field Name column contains the names you specified when you created the table. The Data Type column specifies the type of data that the field can contain. The Description column can contain a description of the field.

> **Tip** You can use field names that include spaces, but this can affect how queries and modules have to be written, so it is best not to do so.

Notice the Primary Key icon (a key and right-pointing arrow) to the left of the ShipperID field. The value in the primary key field is used to uniquely identify each record; that is, no two records can have the same value in this field. You can enter this value yourself, or you can let Access help you with this chore. When the data type of a field is set to AutoNumber, as it is here, Access fills this field in every new record with the next available number.

> **Tip** If you no longer want the table to have a primary key, select the field designated as the primary key in the top portion of the window, and on the Design tab, click Primary Key. If you want to assign a different field as the primary key, select that field, and click Primary Key on the Design tab to make it the primary key and move the icon to that field.

10. Click the **Data Type** for the **ZIP** field, click the arrow that appears, and then in the list, click **Text**.

> **Tip** If you use only five-digit ZIP codes, the numeric data type would be fine. But setting it to Text is a good idea so users can enter ZIP codes in the ZIP + 4 format.

11. Click each field name in turn, and then in the **Field Properties** area, change the **Field Size** to the following:

Company	40
Contact	50
Street	50
City	50
State	2
ZIP	10
Phone	24

> **Troubleshooting** If you change any field properties that might cause data to be lost (for example, making the size of the field smaller), Access will warn you of this when you attempt to save the table.

CLOSE the table, saving your changes, and then close the database.

Creating a Table from a Template

Although manually creating a table is relatively easy, if one of the available table templates is close to what you want, using it might save you a little time and effort.

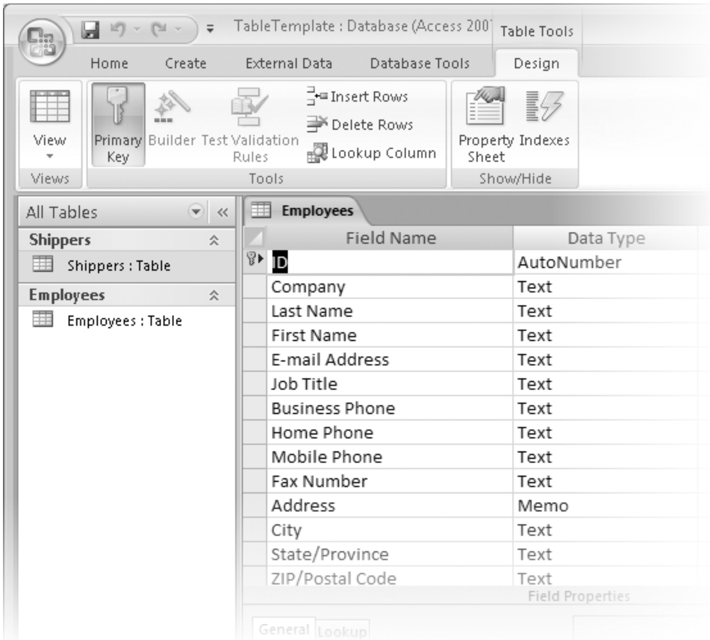
In this exercise, you will use a table template to add an Employees table to an existing database.

> **USE** the *TableTemplate* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessCreating* folder.
>
> **OPEN** the *TableTemplate* database.

1. On the **Create** tab, in the **Tables** group, click the **Table Templates** button to display the list of available templates, and then click **Contacts**.

   A new table opens. This table contains fields appropriate for many common kinds of contact information, but some aren't needed and you will need a few more.

2. On the **Datasheet** contextual tab, in the **Views** group, click the upper half of the **View** button. In the **Save As** dialog box that appears, type **Employees**, and then click **OK**.



3. Right-click anywhere in the **Company** row, and then click **Delete Rows**.
4. Repeat the previous step to delete the **E-Mail Address**, **Business Phone**, **Mobile Phone**, **Fax Number**, **Country**, and **Web Page** rows.

> **Tip** You can select and delete adjacent records by clicking one and then Shift-clicking another. You can't select multiple non-adjacent records.

5. In the **Job Title** field name, select **Job**, and then press the Del key, so the field name is just *Title*.
6. Change the **ID** field name to **EmployeeID**.

   Changing the name of the ID field makes it easier to differentiate the ID field of this table from the ID field of other tables.
7. Change the **Attachments** field name to **Photograph**.

> **Tip** The ability to store and display attachments in a database is new in Access 2007.

8. Click in the first blank **Field Name** cell, and type BirthDate. Then press Enter, type d to scroll the list to **Date/Time**, and press Tab twice.

   The selection moves to the first column in the next row.

9. Repeat the previous step to add a field named DateHired.

Save

10. On the **Quick Access Toolbar**, click the **Save** button.

    The Navigation pane now includes two tables, **Shippers** and **Employees**.

CLOSE the *TableTemplate* database.

Manipulating Table Columns and Rows

When you refine a table's structure by adding fields and changing field properties, you affect the data that is stored in the table. But sometimes you will want to reorganize the table itself to get a better view of the data. If you want to look up a phone number, for example, but the names and phone numbers are several columns apart, you will have to scroll the table window to get the information you need. You might want to rearrange or hide a few columns to be able to see the fields you are interested in at the same time.

You can manipulate the columns and rows of an Access table without affecting the underlying data in any way. You can size both rows and columns, and you can also hide, move, and freeze columns. You can save your table formatting so that the table will look the same the next time you open it, or you can discard your changes without saving them.

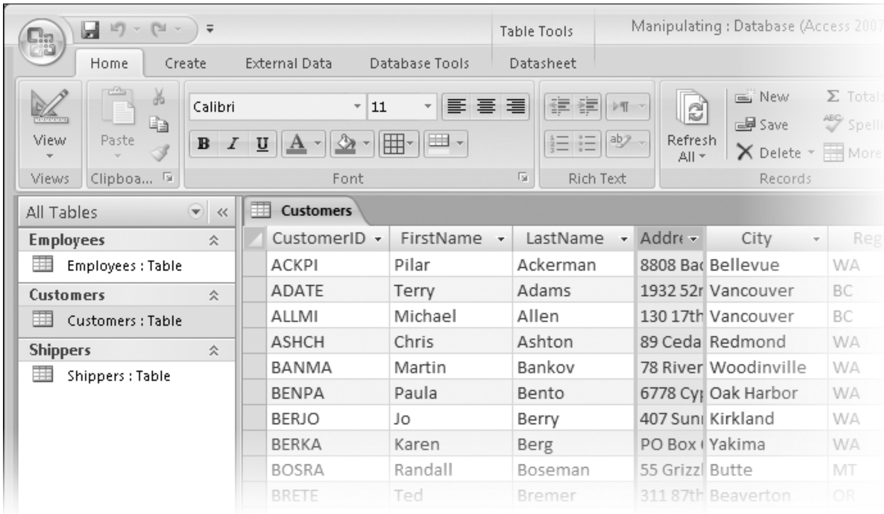
In this exercise, you will open a table and manipulate its columns and rows.

USE the *Manipulating* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessCreating* folder.

OPEN the *Manipulating* database.

1. In the **Navigation Pane**, double-click the **Customers** table to open it in Datasheet view.
2. Drag the vertical bar at the right edge of the **Address** column header to the left until the column is about a half inch wide.

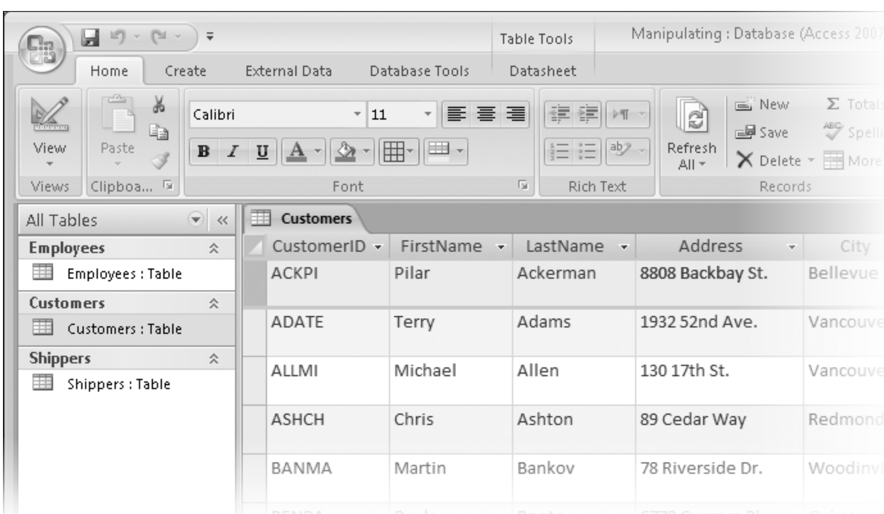
   The column is too narrow to display the entire address.



3. Point to the vertical bar between the **Address** and **City** column headers, and when the pointer changes to a double-headed arrow, double-click the vertical bar.

   Access resizes the column to the left of the vertical bar to the minimum width that will display all the text in that field in all records. This technique is particularly useful in a large table where you can't easily determine the length of a field's longest entry.

4. On the left side of the datasheet, drag the horizontal bar between any two record selectors downward to increase the height of all rows in the table.



5. On the **Home** tab, in the **Records** group, click the **More** button, and then click **Row Height**.
6. In the **Row Height** dialog box, select the **Standard Height** check box, and then click **OK**.

   Access resets the height of all rows to the default setting. (You can also set the rows to any other height in this dialog box.)
7. Click anywhere in the **FirstName** column. In the **Records** group, click the **More** button, and then click **Hide Columns**.

   The FirstName column disappears, and the columns to its right shift to the left.

> **Tip** If you select several columns before clicking Hide Columns, they all disappear. You can select adjacent columns by clicking in the header of one, holding down the Shift key, and then clicking in the header of another. The two columns and any columns in between are selected.

8. To restore the hidden field, in the **Records** group, click the **More** button, and then click **Unhide Columns**.

   The Unhide Columns dialog box opens.

9. In the **Unhide Columns** dialog box, select the **FirstName** check box, and then click **Close**.

   Access redisplays the FirstName column.

10. Drag the right side of the database window to the left to reduce its size so that you cannot see all fields in the table.
11. Point to the **CustomerID** column header, hold down the mouse button, and drag through the **FirstName** and **LastName** column headers. With the three columns selected, click the **More** button in the **Records** group, and then click **Freeze**.
12. Scroll the window to the right.

    The first three columns remain in view.
13. In the **Records** group, click **More**, and then click **Unfreeze** to restore the columns to their normal condition.

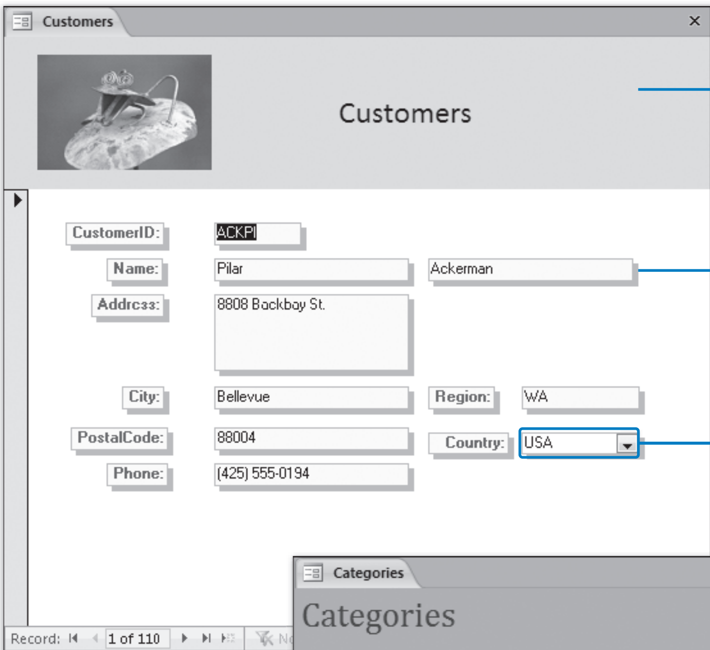
> **Tip** The commands to hide, unhide, freeze, or unfreeze columns are available from the shortcut menu that appears when you right-click a column header.

> **CLOSE** the table without saving your changes, and then close the *Manipulating* database. If you are not continuing directly on to the next chapter, exit Access.

Key Points

- Access 2007 includes templates to help you quickly and easily create databases and tables.
- In Design view, you can modify any object you created manually or from a template.
- Rather than storing all information in one table, you can create different tables for each type of information, such as employee, customer, and supplier contact information, or book, video, and CD catalog information.
- Properties determine what data can be entered in a field, and how the data will look on the screen. In Design view, you can change some properties without affecting the data stored in the table; but changing some might affect the data, so you must exercise caution when modifying properties.
- You can adjust the structure of a table—by manipulating or hiding columns and rows—without affecting the data stored in the table.

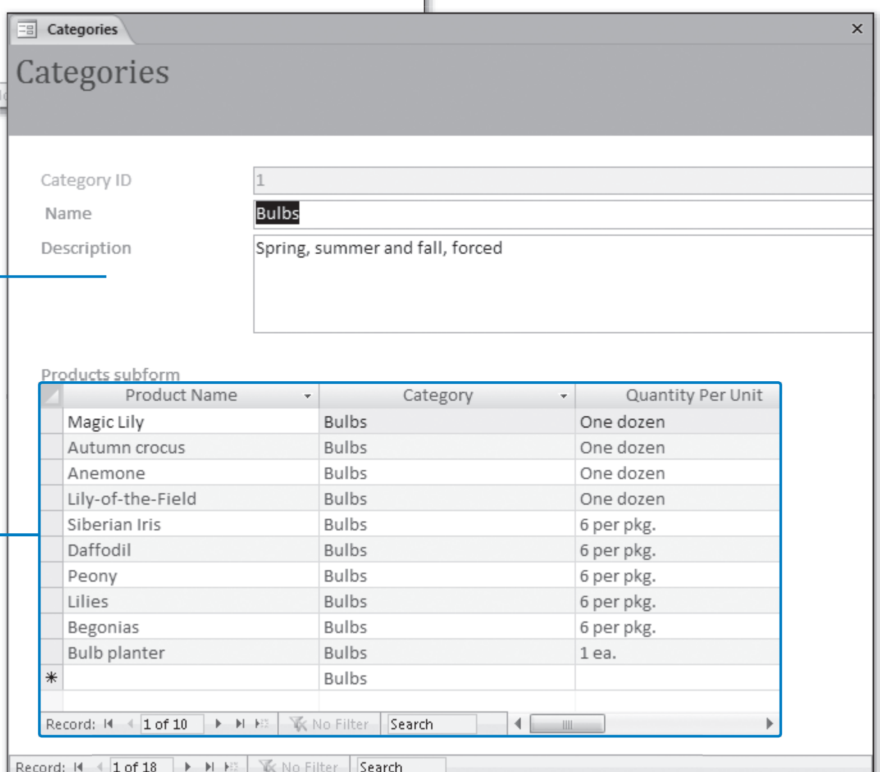
Chapter at a Glance



Create a form, **pages 258 and 283**

Refine form properties, **page 262**

Add controls to a form, **page 273**



Change the arrangement of a form, **page 268**

Add a subform to a form, **page 287**

10 Simplifying Data Entry by Using Forms

In this chapter, you will learn to:

- ✔ Create a form by using the Form tool.
- ✔ Refine form properties.
- ✔ Change the arrangement of a form.
- ✔ Add controls to a form.
- ✔ Enter data in a form by using VBA.
- ✔ Create a form by using an AutoForm.
- ✔ Add a subform to a form.

A database that contains the day-to-day records of an active company is useful only if it is kept current and if the information stored in it can be found quickly. Although Microsoft Office Access 2007 is fairly easy to use, entering, editing, and retrieving information in Datasheet view is not a task you would want to assign to someone who's not familiar with Access. Not only would these tasks be tedious and inefficient, but working in Datasheet view leaves far too much room for error, especially if details of complex transactions have to be entered into several related tables. The solution to this problem, and the first step in the conversion of this database to a database application in which you can efficiently manage information, is to create and use forms.

A form is an organized and formatted view of some or all of the fields from one or more tables or queries. Forms work interactively with the tables in a database. You use controls in the form to enter new information, to edit or remove existing information, or to locate information. Like printed forms, Access forms can include label controls that tell users what type of information they are expected to enter, as well as ***text box controls*** in which they can view or enter information. Unlike printed forms, Access forms can also include a variety

of other controls, such as ***option buttons*** and ***command buttons*** that transform Access forms into something very much like a Windows dialog box or wizard page.

> **Tip** You can also create forms to navigate among the features and functions of a database application while having little or no connection with its actual data. A ***switchboard*** is an example of this type of form.

As with other Access objects, you can create forms manually or with the help of a wizard. It is best to create navigational and housekeeping forms, such as switchboards, manually in Design view. However, you should always create forms that are based on tables by using a wizard, and then refine the form manually—not because it is difficult to drag the necessary controls onto a form, but because there is simply no point in doing it manually.

In this chapter, you will discover how easy it is to create forms—either by using the Form tool or by using the Form wizard—that you can modify to suit your needs, and how to present information from multiple tables in one form by using subforms. You will control a form's function and appearance by inserting controls and modifying the form and control properties. Then you will learn how to automatically enter data in a form by using Microsoft Visual Basic for Applications (VBA) when a user performs an action in the control, such as clicking or entering text.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

> **Important** Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

> **Troubleshooting** Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Creating a Form by Using the Form Tool

Before you begin creating a form, you need to know which database query or table to base it on, and have an idea of how the form will be used. After making these decisions,

you can create a form in many ways. Remember that like almost any other object in Access, after you create the form, you can customize it in Design view if it does not quite meet your needs.

The quickest way is to select a table or query in the Navigation Pane, and then click the Form button in the Forms group on the Create tab. This creates a simple form using all the fields in the table or query, and opens it in Layout view.

If there is one (and only one) other table in the database that has a one-to-many relationship with the table on which your form is based, then the Form tool adds a datasheet (called a subform) which displays all the records in the related table that pertain to the current record in the main form.

In this exercise, you will use the Form tool to create a form based on a table.

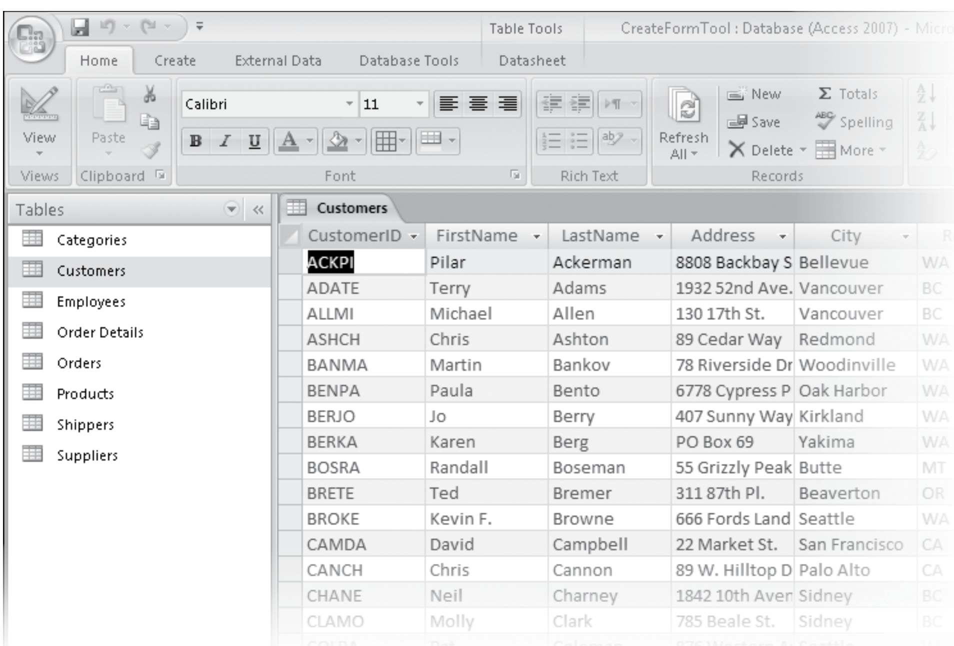
USE the *CreateFormTool* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessSimplifying* folder.

BE SURE TO start Access before beginning this exercise.

OPEN the *CreateFormTool* database.

1. In the **Navigation Pane**, in the **Tables** list, double-click **Customers**.

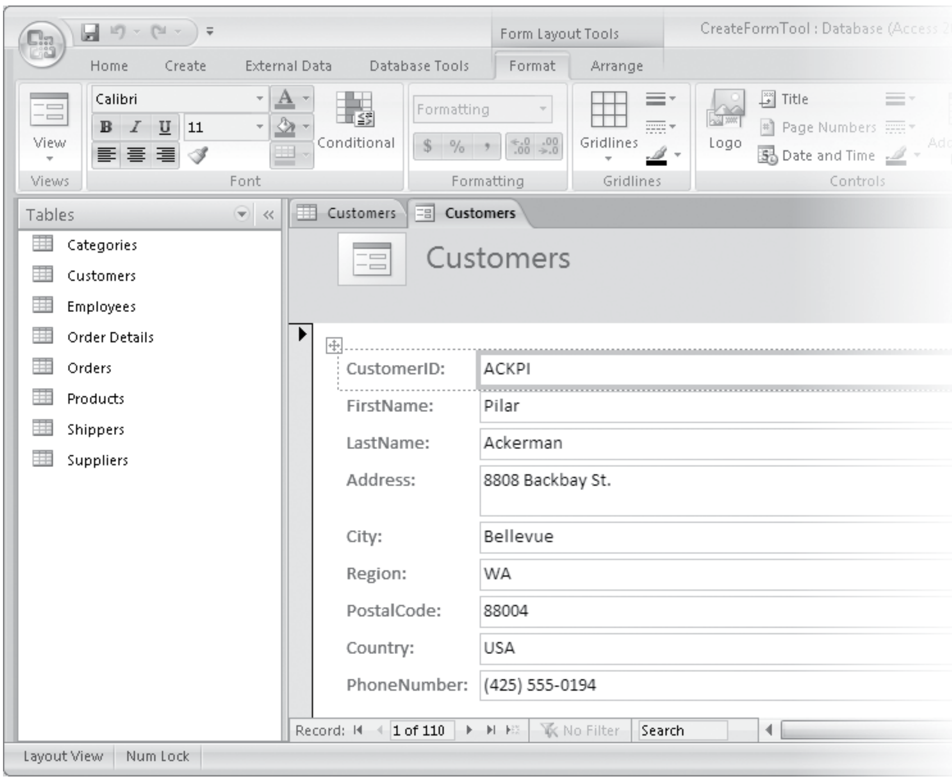
The Customers table opens in Datasheet view.



2. On the **Create** tab, in the **Forms** group, click the **Form** button.

   Access creates and displays a simple form based on the active table.

> **Tip** You don't have to open a table to create a form based on it. You can simply click the table in the Navigation Pane to select it, then click the Form button on the Create tab in the Forms group. But it is sometimes useful to have the table open behind the form in order to verify the form contents against the table contents.



The Form tool automatically added a title (Customers) and a placeholder for a logo in the form header.

3. Scroll through a few of the records by using the navigation controls at the bottom of the form.

   You can compare the information shown in the form to that in the datasheet view of the table by alternately clicking the Customers table tab and the Customers form tab in the database window to easily switch back and forth between views.

CLOSE the Customers form (without saving your changes) and the *CreateFormTool* database.

Relationships

In Access, a ***relationship*** is an association between common fields in two tables. You can use this association to link information in one table to information in another table. For example, you can establish a relationship based on the CategoryID field between the Categories table and the Products table. Each product is in only one category, but each category can contain many products, so this type of relationship—the most common—is known as a ***one-to-many relationship***.

Less common relationships include:

- ***One-to-one relationships***, in which each record in one table can have one and only one related record in the other table.

  This type of relationship isn't commonly used because it is easier to put all the fields in one table. However, you might use two related tables instead of one to break up a table with many fields, or to track information that applies to only some of the records in the first table.

- ***Many-to-many relationships***, which are really two one-to-many relationships tied together through a third table.

  You could see this relationship in a database that contains Products, Orders, and Order Details tables. The Products table has one record for each product, and each product has a unique ProductID. The Orders table has one record for each order placed, and each record in it has a unique OrderID. However, the Orders table doesn't specify which products were included in each order; that information is in the Order Details table—the table in the middle that ties the other two tables together. Products and Orders each have a one-to-many relationship with Order Details. Products and Orders therefore have a many-to-many relationship with each other. In plain language, this means that every product can appear in many orders, and every order can include many products.

If there is a one-to-many relationship between two tables in a database, an excellent way to display this is through the use of a form containing a ***subform***. The main, or primary, form displays one record from the "one" side of the one-to-many relationship, and the subform lists all the pertinent records from the "many" side of the relationship.

Refining Form Properties

As with tables, you can work with forms in multiple views. The two most common views are Form view, in which you view or enter data, and Design view, in which you add controls to the form or change the form's properties or layout.

When you create a form by using the Form tool or the Form wizard, every field included on the form is represented by a text box control and its associated label control. A form like the one you created earlier in this chapter is linked, or ***bound***, to the table it's based on. Each text box is bound to a specific field in the table. The table is the ***record source***, and the field is the ***control source***. Each control has a number of properties, such as font, font size, alignment, fill color, and border. You can change the default values of these properties to improve the form's appearance.

A form inherits some of its properties from the table on which it is based. For instance, text box names on the form match field names in the source table, text box labels match the Caption property of each field, and the width of each text box is determined by the Field Size property. However, the properties of a form are not bound to their source. After you have created a form you can change the properties of the fields independently in the table and on the form.

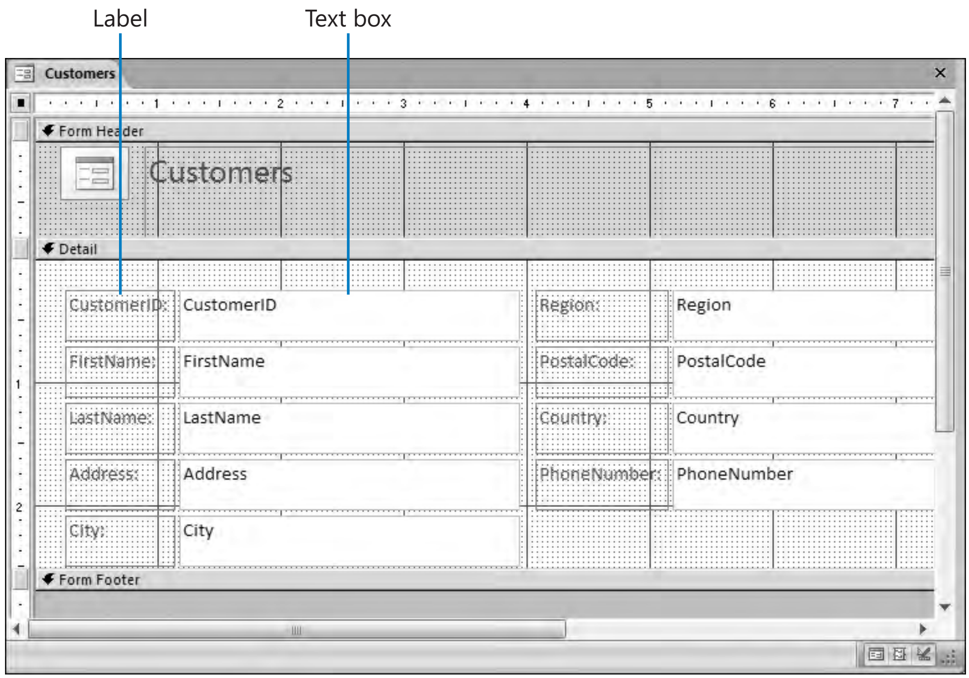
In this exercise, you will edit the properties of a form.

USE the *RefineProperties* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessSimplifying* folder.

OPEN the *RefineProperties* database.

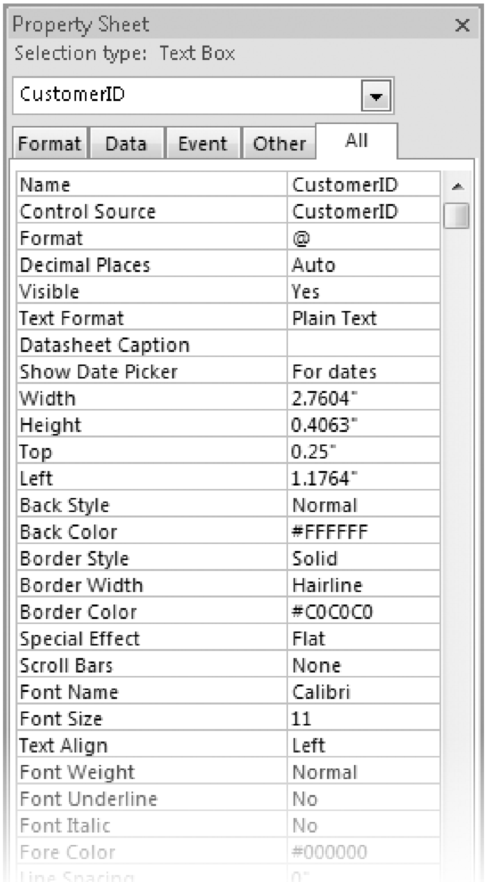
1. In the **Navigation Pane**, in the **Forms** list, right-click **Customers**, and then click **Design View**.

   The Customers form opens in Design view. The form is arranged in a Stacked layout that limits the extent of changes you can make to the form.



2. Click the top border of the blue **Form Footer** header and drag the **Form Footer** down about three inches to enlarge the **Detail** grid.
3. Click the **Detail** section of the form above the **Region** label, and then drag to draw a rectangle through some portion of all the controls on the right side of the form to select them.
4. Drag the selected group of controls down and to the left, positioning them just below the **City** label, then click any blank section of the grid to release the selection.
5. On the **Customers** form, click the **CustomerID** label (not its text box).
6. On the **Design** contextual tab, in the **Font** group, click the **Font** arrow, and then in the list, click **MS Sans Serif**.
7. With the label still selected, click the **Font Size** arrow, and then in the list, click **8**.

   The label text becomes slightly smaller.
8. If the **Property Sheet** pane is not visible, right-click the **CustomerID** text box (not its label), and then click **Properties**.



All the settings available in the Font group (plus a few more) are available in the Property Sheet pane associated with each control. From this pane, you can display the properties of any object on the form, including the form itself.

You can display related types of properties by clicking the appropriate tab: Format, Data, Event, or Other, or display all properties by clicking the All tab.

9. In the **Property Sheet** pane, click the **Format** tab, scroll to the **Font Name** property, and change it to **MS Sans Serif**. Then set the **Font Size** property to **8**, and the **Font Weight** property to **Bold**.

   The CustomerID text in the form reflects your changes.

> **Tip** You can change the width of a task pane by dragging its edge, and you can ***undock*** it so it floats in the program window by dragging it by the title bar.

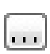
10. Click the arrow in the **Property Sheet** pane header, and then in the property list, click **Label3** to select the label to the left of the **FirstName** text box.
11. Repeat step 9 to change the font of the text in the **FirstName** label box.

    These different ways of selecting a control and changing its properties provide some flexibility and convenience, but it would be a bit tedious to make changes to a few dozen controls in a form. The next two steps provide a faster method.
12. Click anywhere in the **Detail** section of the form, and then drag diagonally to draw a rectangle through some portion of all the controls to select them.

    > **Tip** You can select all the controls in a form, including those in the header and footer, by pressing Ctrl+A.

    Small handles appear around the selected controls. In the Property Sheet pane, the Selection type changes to *Multiple selection*, and the Objects box is blank. Only the Format settings that are the same for all the selected controls are displayed. Because the changes you made in the previous steps are not shared by all the selected controls, the Font Name, Font Size, and Font Weight settings are now blank.
13. Repeat step 9 to set the same **Font Name**, **Font Size**, and **Font Weight** properties for all the selected controls.
14. With all the controls still selected, on the **Format** tab of the **Property Sheet** pane, set the **Back Style** property to **Normal**.

    The background of the labels is no longer transparent.


Build

15. Click the **Back Color** property, and then click the Build button that appears.
16. In the **Color Builder** gallery that opens, click the **yellow** square, and then press Enter.

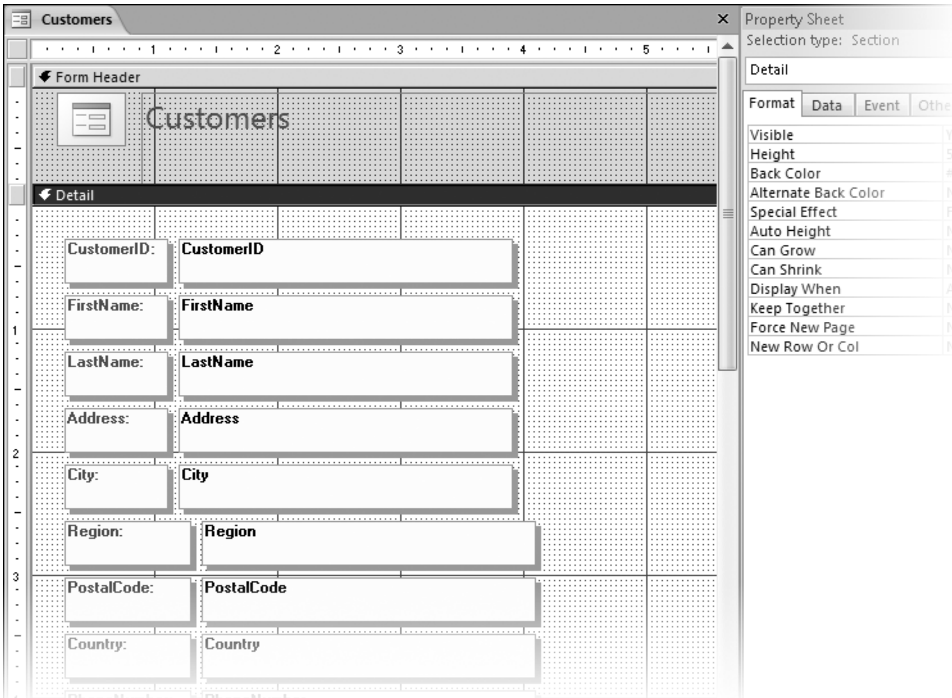
    The background of all the controls changes to a bright yellow, and the hexadecimal number representing this shade (#FFF200) appears in the Back Color property box.

    > **Tip** If the Color Builder doesn't include a color you want to use, click More Colors at the bottom of the gallery, select a color on the Standard or Custom tab of the Colors dialog box, and then click OK to set the color and add it to the list of recent colors at the bottom of the gallery.

17. In the **Back Color** property box, replace *#FFF200* with #FFFFCC.

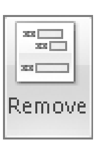
    The background color changes to a pale yellow.

18. Set the **Special Effect** property to Shadowed and the **Border Color** property to green.
19. In the form, click away from the selected controls to release the selection (in other words, to *deselect* the controls).



20. Click the **FirstName** label. In the **Property Sheet** pane, scroll up to the **Caption** property, change it from *FirstName* to Name, and then press Enter.
21. Repeat step 20 to change *Phone Number* to Phone.

> **Tip** You can edit the Caption property of a label or the Control Source property of a text box by selecting it, clicking its text, and then editing the text as you would in any other Windows program. However, take care when editing the Control Source property, which defines where the content of the text box comes from.



22. Drag through all the controls on the form to select them. On the **Arrange** tab, in the **Control Layout** group, click the **Remove** button.

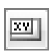
    Removing the Stacked layout gives you more options for arranging the controls.
23. Click away from the selected controls to release the selection.

24. Click the label to the left of **LastName**, and then press the Del key.

25. Select all the labels, but not their corresponding text boxes, by holding down the Shift key as you click each of them or by dragging through just the labels. Then in the **Property Sheet** pane, set the **Text Align** property to **Right**.

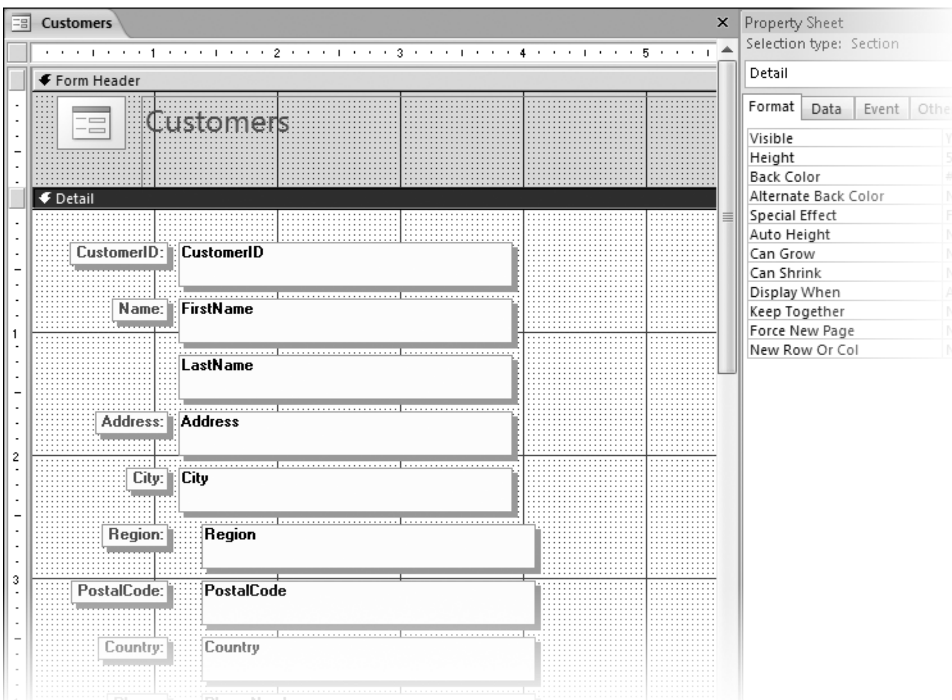
    Now let's size the bottom four label boxes to match the ones above, and line up their associated text boxes.

26. Select the bottom four labels, but not their text boxes, and change their width property to 0.8847".



Size to Fit

27. Select all the labels again. On the **Arrange** contextual tab, in the **Size** group, click the **Size to Fit** button to resize the labels to fit their contents, and then click anywhere in the form (but outside the controls) to release the selection.



> **Tip** The order in which you make formatting changes, such as the ones you just made, can have an impact on the results. If you don't see the expected results, click the Undo button on the Quick Access Toolbar, or press Ctrl+Z, to step back through your changes. Then try again.

28. Select all the text boxes (but not their corresponding labels), and in the **Property Sheet** pane, change the **Left** setting to 1.5" to line up the text boxes and insert space between them and the labels.

29. Change the **Font Weight** property to **Normal**, and then click anywhere in the form, but outside the controls, to deselect them.


Save

30. On the **Quick Access Toolbar**, click the **Save** button to save the design of the Customers form.

CLOSE the *RefineProperties* database.

Tip Unless you close the Property Sheet pane, it remains open until you close all open forms.

Changing the Arrangement of a Form

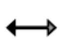
Both automatically generated forms and forms created by a wizard are functional, not fancy. However, it's fairly easy to customize the layout to suit your needs and preferences. You can add and delete labels, move both labels and text controls around the form, add logos and other graphics, and otherwise improve the layout of the form to make it attractive and easy to use.

While you work with a form's layout, you should pay attention to the shape of the pointer, which changes to indicate the manner in which you can change the selected item. Because a text box and its label sometimes act as a unit, you have to be aware of the pointer's shape before making any change. The shape of the pointer indicates the action to be taken:


Four-headed arrow. Drag to move both controls together, or independently if the pointer is over a large square in the upper-left corner of the control.


Pointing finger. Drag to move just the control.


Vertical arrow. Drag the top or bottom border to change the height.


Horizontal arrow. Drag the right or left border to change the width.


Diagonal arrow. Drag the corner to change both the height and width.

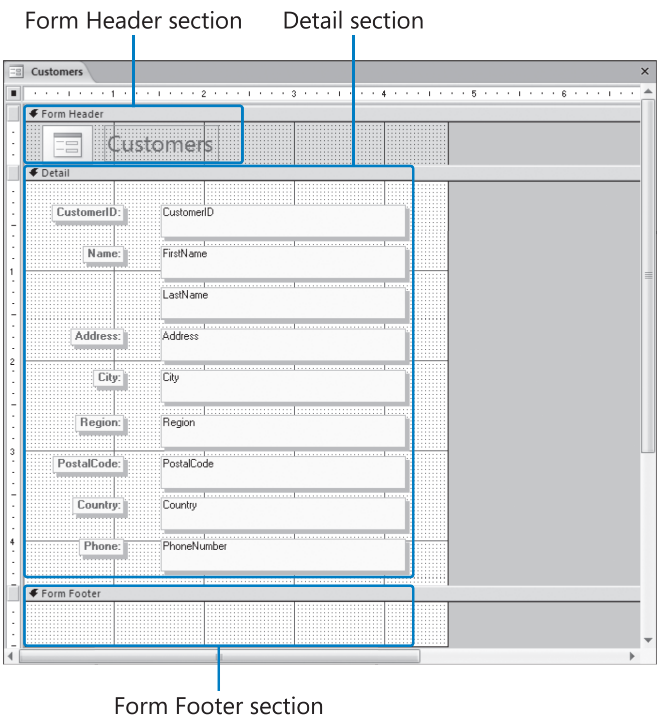
In this exercise, you will rearrange the label and text box controls in a form.

USE the *RefineLayout* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessSimplifying* folder.

OPEN the *RefineLayout* database.

1. In the **Navigation Pane**, under **Forms**, right-click **Customers**, and then click **Design View**.

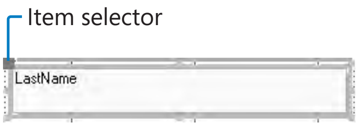
   The form is divided into three sections: Form Header, Detail, and Form Footer. We are interested in only the Detail section right now.



> **Troubleshooting** If you can't see the Form Footer, you may have to use the scroll bar to scroll down in the form until the footer appears. You can also right-click any group title or anywhere in the tab area of the Ribbon and then click Minimize The Ribbon to gain more screen space for your form. Right-click the minimized Ribbon and click Minimize The Ribbon again to restore the Ribbon.

2. Point to the right edge of the **Detail** grid, and when the pointer changes to a double-headed arrow, drag the edge of the background to the right until you can see about seven full grid sections.

3. Click the **LastName** text box, and then slowly move the pointer around its border, from handle to handle (there are eight handles), noticing how the pointer changes shape.

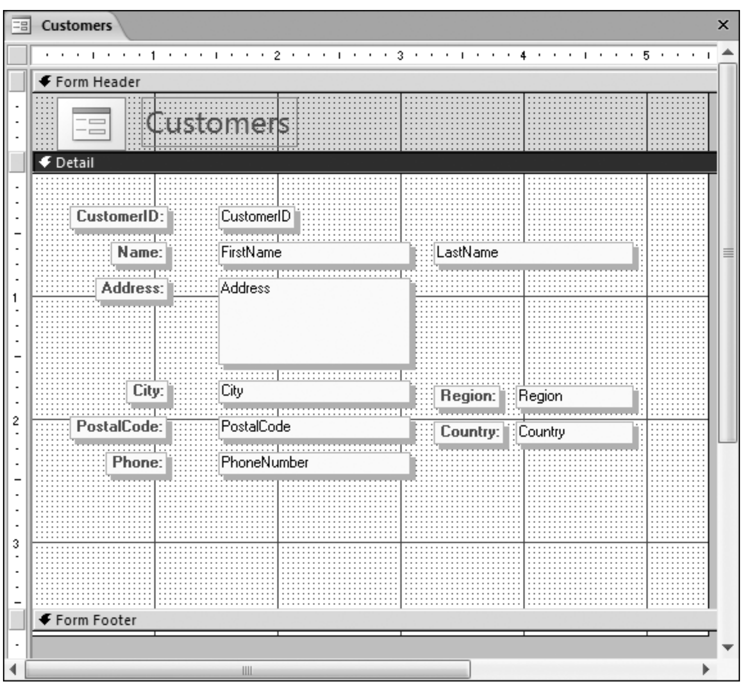


If a label or text box can be moved independently, then it will have a larger item selector in its upper-left corner.

4. Move the pointer over the **LastName** text box, and when it changes to a four-headed arrow, drag it up and to the right of the **FirstName** text box.

> **Tip** If you can't move the label independently of the text box, the form is probably in Stacked layout. Drag through all the controls to select them, and then click the Remove button in the Control Layout group on the Arrange tab.

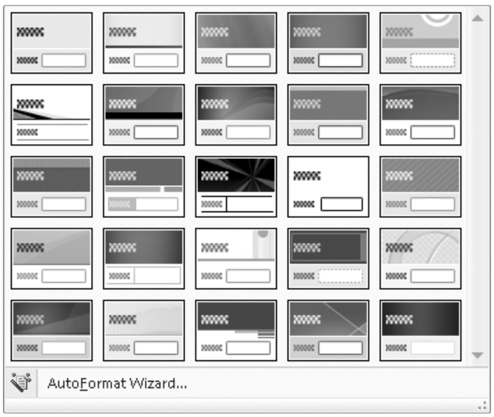
5. Resize each control, and then arrange them in logical groupings on the form.



> **Tip** To fine-tune the position of a control, click it and then move the control by pressing the Up Arrow, Down Arrow, Left Arrow, or Right Arrow key. To move the control lesser distances, hold down the Ctrl key while pressing the arrow key. To fine-tune the size of a control, hold down the Shift key while pressing the arrow key.

6. On the **Arrange** contextual tab, in the **AutoFormat** group, click the **AutoFormat** button.

   The AutoFormat gallery opens.

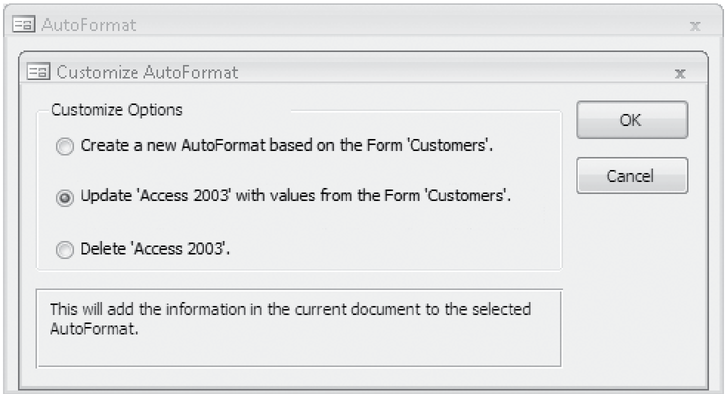


7. At the bottom of the **AutoFormat** gallery, click **AutoFormat Wizard**.

   The AutoFormat wizard starts. Unlike most wizards, this one has only one page.

8. In the **AutoFormat** dialog box, click **Customize**.

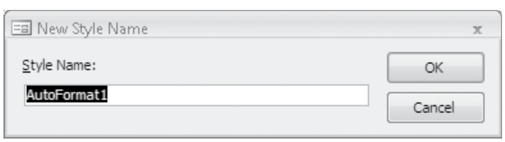
   The Customize AutoFormat wizard starts. Unlike most wizards, this one has only one page.



9. In the **Customize AutoFormat** dialog box, click **Create a new AutoFormat based on the Form 'Customers'**, and then click **OK**.

> **Tip** Form controls inherit whatever theme is set in the operating system. To change the theme, open Control Panel, click Appearance And Personalization, and then in the Personalization area, click Change The Theme. In the Theme Settings dialog box, select the theme you want, and then click OK.

The New Style Name dialog box opens.



10. In the **Style Name** box, type **Customers**, and then click **OK**.

    In the AutoFormat wizard, the new style appears in the Form AutoFormats list. This style will now be available in any database you open on this computer.

11. In the **AutoFormat** wizard, click **OK**.

> **Tip** Access saves data automatically as you enter it, but you must manually save layout changes to any object.

CLOSE the Customers form, saving your changes, and then close the *RefineLayout* database.

Adding Controls to a Form

Every form has three basic sections: Form Header, Detail, and Form Footer. When you use the Form tool or a wizard to create a form, it adds a set of controls for each field that you select from the underlying table to the Detail section, adds a logo placeholder and/or caption to the Form Header, and leaves the Form Footer section blank. Because the Footer section is empty, Access collapses it, but you can resize the Footer section by dragging its ***selector***. Although labels and text box controls are perhaps the most common controls found in forms, you can also enhance your forms with many other types of controls. For example, you can add groups of option buttons, check boxes, and list boxes to present people with choices instead of having them type entries in text boxes.

The controls that you can add to a form are located on the Design tab in the Controls group.

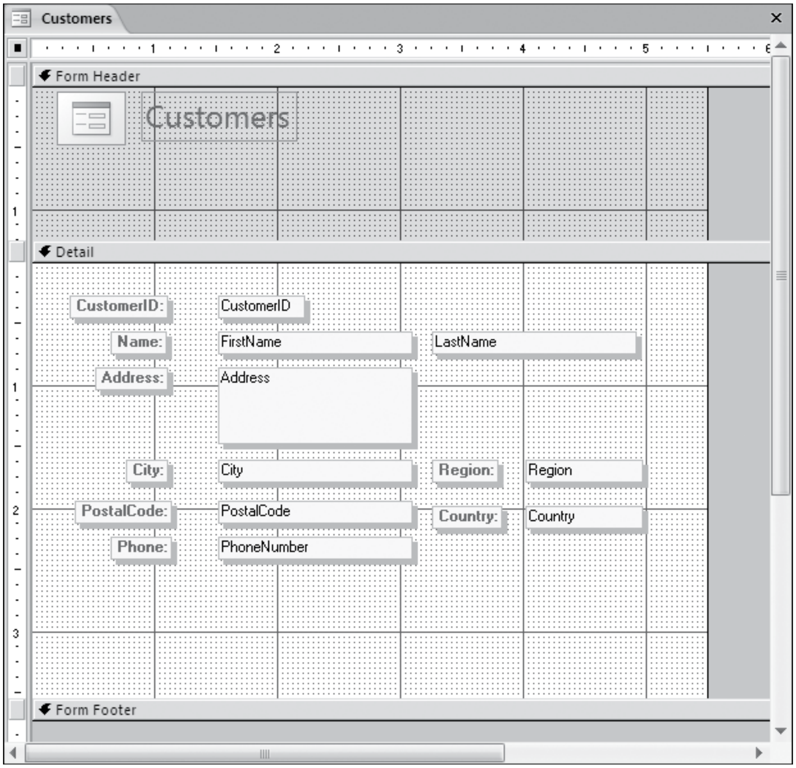
In this exercise, you will replace the logo and caption automatically placed in a form by the Form tool. You will also replace a text box control in the Detail section with a combo box control, and remove the record selector bar from the program window.

USE the *AddControls* database and the *CustomersFormLogo* graphic. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\AccessSimplifying* folder.

OPEN the *AddControls* database. Then open the Customers form in Design view.

1. In the **Customers** form, point to the horizontal line between the **Form Header** section selector and the **Detail** section selector, and when the pointer changes to a double-headed arrow, drag the **Detail** section selector down a little more than an inch.

   Tip Use the rulers along the top and left side of the form as guides.



2. Select the logo and the caption in the **Form Header**, and then press Del.


Image

3. On the **Design** contextual tab, in the **Controls** group, click the **Image** button, and then, at the left end of the **Form Header** section, drag diagonally to draw a rectangle about 1 inch high and 1.5 inches wide.

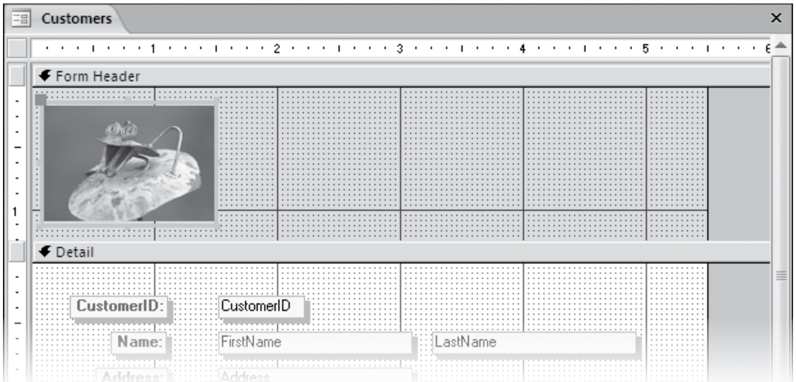
   To view information about a control, point to its button in the Controls group. After a few seconds a ScreenTip is displayed.

> **Tip** Access 2007 has a new Logo control that prompts you to enter a graphic name, and then automatically inserts the graphic in the form header.

4. In the **Insert Picture** dialog box, navigate to the *Documents\Microsoft Press\2007OfficeSBS\AccessSimplifying* folder, and then double-click the *CustomersFormLogo* graphic.

> **Troubleshooting** If the practice file isn't visible, change the Files Of Type setting to Graphics Files.

   The logo appears inside the image control.



Tip How an image fits into an image control is determined by the Size Mode property of the control. If the property is set to Clip and the control isn't large enough to display the entire image, the image is cropped. If the property is set to Stretch, you can enlarge the control to display the entire image. If the property is set to Zoom, the image will automatically resize to fit the control.

5. In the **Controls** group, click the **Label** button, and then drag diagonally to draw another rectangle in the header section.

   Access inserts a label control containing the insertion point, ready for you to enter a caption.

6. In the active label control, type Customers. Then press Enter.

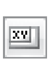
   The Customers label takes on the formatting of the other labels.

Troubleshooting Access displays a Smart Tag next to the control, warning you that the label is not associated with any other control. You can ignore this, or click Ignore Error to make it go away.

7. If the **Property Sheet** pane is not already open, press F4 to open it.

Tip You can toggle the display of the Property Sheet pane by pressing the F4 key.

8. Change the **Font Size** property to **18**, and the **Text Align** property to **Center**. Then close the **Property Sheet** pane.

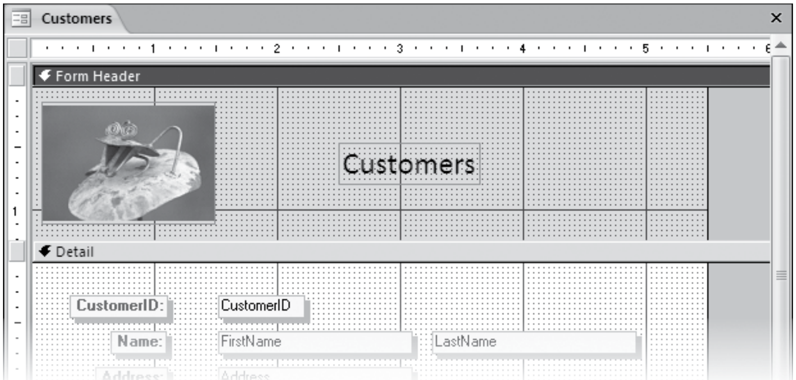


Size to Fit

9. On the **Arrange** tab, in the **Size** group, click the **Size to Fit** button.

   The size of the label control changes to fit the text.

10. Adjust the size and position of the image and label controls so that they are side by side.




Use Control Wizards

11. On the **Design** tab, in the **Controls** group, look at the **Use Control Wizards** button. If the button is active (orange), click it to deactivate it.

Turning off the Control Wizards feature enables you to add a control with all the default settings, without having to work through the wizard's pages.


Combo Box

12. In the **Controls** group, click the **Combo Box** button. Then drag diagonally to draw a rectangle just below the **Country** text box.

When you release the mouse button, Access displays a combo box control, which is ***unbound*** (not attached to a field in the Customers table).

> **Troubleshooting** Access assigns a number to each control when it is created. Don't be concerned if the number displayed in your control is different from what you see in the graphics in this book.


Format Painter

13. Click the **Country** text box. In the **Font** group, click the **Format Painter** button and then click the combo box control.

Access copies the formatting of the text box to the combo box control and its label.

14. If the **Property Sheet** pane is not open, right-click the combo box, and then click **Properties**.

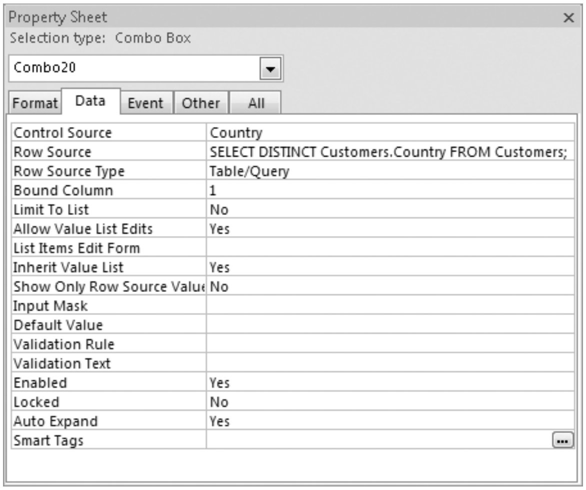
15. In the **Property Sheet** pane, on the **Data** tab, click the **Control Source** arrow, and then in the list, click **Country**.

16. In the **Row Source** box, type

SELECT DISTINCT Customers.Country FROM Customers;

There is a period (but no space) between *Customers* and *Country*, and a semicolon at the end of the text.

This line of code is a query that extracts one example of every country in the Country field of the Customers table and displays the results as a list when you click the Country arrow.

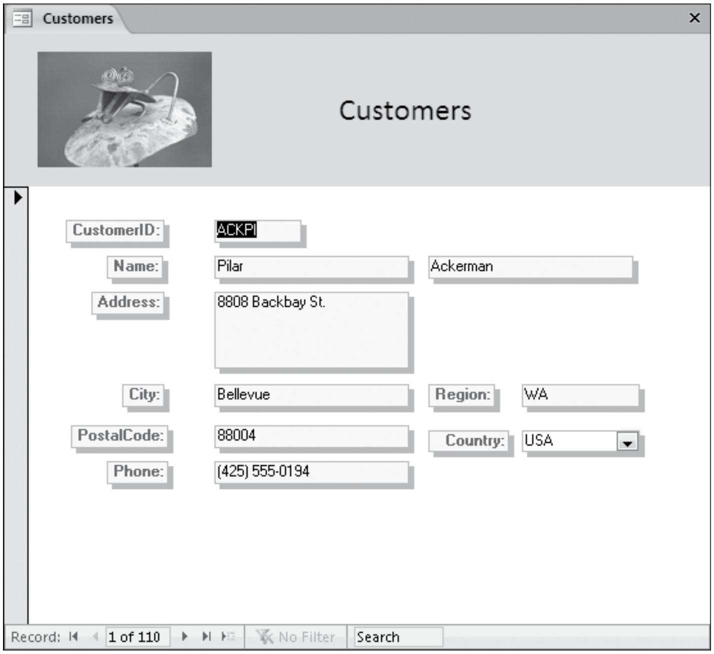


You might have to widen the Property Sheet pane to display the entire query.

> **Tip** If you need to add a customer from a country that is not in the list, you can type the country's name in the combo box. After the record is added to the database, that country shows up when the combo box list is displayed.

17. If it isn't set that way already, set the **Row Source Type** to **Table/Query**.
18. Click the combo box label. (If you can't see the combo box label, move the **Property Sheet** pane.)
19. In the **Property Sheet** pane, on the **Format** tab, change the **Caption** to Country. Then close the **Property Sheet** pane.
20. Delete the original **Country** text box and its label, and then move the new combo box and label into their place, resizing them as needed.
21. On the **Home** tab, in the **Views** group, click the **View** button to see your form in Form view.

> **Tip** When a form is in Layout view or Design view, you can switch to Form view by clicking the View button.



22. Scroll through a couple of records, and then click the combo box arrow to display the country list.
23. You don't need the *record selector*—the gray bar along the left edge of the form—for this exercise, so return to Design view and display the **Property Sheet** pane for the entire form by clicking the **Form** selector (the box at the junction of the horizontal and vertical rulers) and pressing F4 (if the sheet is not already displayed). Then on the **Format** tab, change **Record Selectors** to **No**, and **Scroll Bars** to **Neither**. Then press F4 again to close the **Property Sheet** pane.
24. Save the form's new design, and then switch to Form view for a final look.

CLOSE the *AddControls* database.

Entering Data in a Form by Using VBA

As you might suspect by now, almost everything in Access, including the Access program itself, is an object. One of the characteristics of objects is that they can recognize and respond to *events*, which are essentially actions. Different objects recognize different events. The basic events, recognized by almost all objects, are Click, Double Click, Mouse

Down, Mouse Move, and Mouse Up. Most objects recognize quite a few other events. A text control, for example, recognizes 17 different events; a form recognizes more than 50.

> **Tip** The events recognized by an object are listed on the Event tab in the object's Property Sheet pane.

While you use a form, objects are signaling events, or ***firing events***, almost constantly. However, unless you attach a macro or VBA procedure to an event, the object is really just firing blanks. By default, Access doesn't do anything obvious when it recognizes most events. So without interfering with the program's normal behavior, you can use an event to specify what action should happen. You can even use an event to trigger a macro to run or a VBA procedure to perform a set of actions.

Sound complicated? Well, it's true that events are not things most casual Access users tend to worry about. But because knowing how to handle events can greatly increase the efficiency of objects such as forms, it is helpful to have an idea of what they're all about.

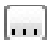
For example, while looking at customer records in one of the exercise databases, you might have noticed that the CustomerID is composed of the first three letters of the customer's last name and the first two letters of his or her first name, all in capital letters. This technique usually generates a unique ID for a new customer. If you try to enter an ID that is already in use, Access won't accept the new entry, and you'll have to add a number or change the ID in some other way to make it unique. Performing trivial tasks, such as combining parts of two words and then converting the results to capital letters, is something a computer excels at. So rather than typing the ID for each new customer record that is added to the database, you can let VBA do it for you.

In this exercise, you will write a few lines of VBA code and attach the code to an event in a form. This is by no means an in-depth treatment of VBA, but this exercise will give you a taste of the power of VBA.

> **USE** the *VBA* database and the *AftUpdate* text file. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\AccessSimplifying* folder.
>
> **OPEN** the *VBA* database. Then open the Customers form in Design view.

1. In the **Customers** form, click the **LastName** text box, and then if the **Property Sheet** pane isn't already open, press F4 to open it.
2. Click the **Event** tab.

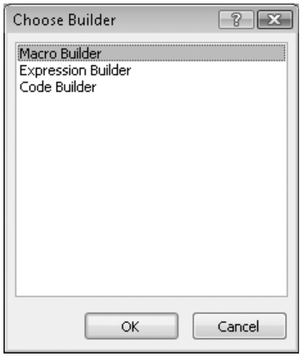
   This tab lists the events to which the LastName text box control can respond.



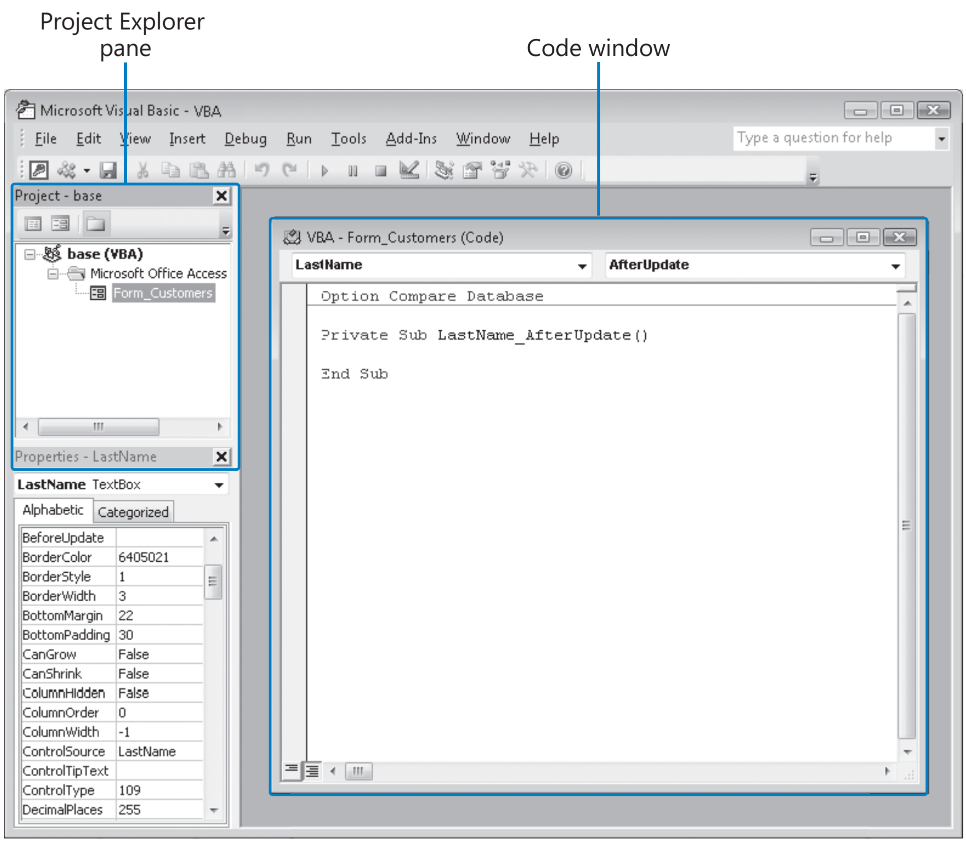
Build

3. In the **Property Sheet** pane, click the **Build** button to the right of the **After Update** property.

   The Choose Builder dialog box opens, offering you the options of building an expression, a macro, or VBA code.



4. Click **Code Builder**, and then click **OK** to start the VBA Editor.



The Project Explorer pane lists any objects in the database to which you can attach code; in this case, only the Customers form (Form_Customers) appears in the list. New forms and reports appear here automatically.

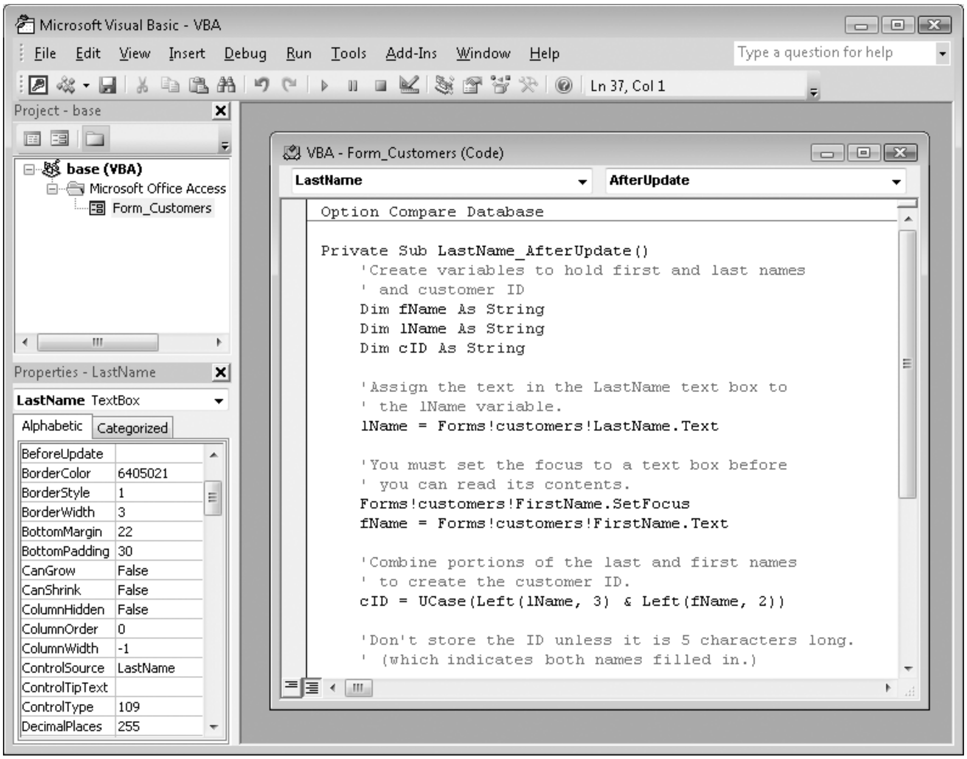
The Code window displays a placeholder for the procedure that Access will use to handle the After Update event for the LastName text box control. This procedure is named *Private Sub LastName_AfterUpdate()*, and at the moment it contains only the *Sub* and *End Sub* statements that mark the beginning and end of any procedure.

5. Navigate to your *Documents\Microsoft Press\2007OfficeSBS\AccessSimplifying* folder, double-click the *AftUpdate* text file to open it in your default text editor, and then copy the following lines of text to the Clipboard.

```
'Create variables to hold first and last names
' and customer ID
Dim fName As String
Dim lName As String
Dim cID As String

'Assign the text in the LastName text box to
' the lName variable.
lName = Forms!customers!LastName.Text

'You must set the focus to a text box before
' you can read its contents.
Forms!customers!FirstName.SetFocus
fName = Forms!customers!FirstName.Text

'Combine portions of the last and first names
' to create the customer ID.
cID = UCase(Left(lName, 3) & Left(fName, 2))

'Don't store the ID unless it is 5 characters long
' (which indicates both names filled in).
If Len(cID) = 5 Then
     Forms!customers!CustomerID.SetFocus

     'Don't change the ID if it has already been
     ' entered; perhaps it was changed manually.
     If Forms!customers!CustomerID.Text = "" Then
          Forms!customers!CustomerID = cID
     End If
End If

'Set the focus where it would have gone naturally.
Forms!customers!Address.SetFocus
```

> **Important** A line of text beginning with an apostrophe is a comment that explains the purpose of the next line of code. In the VBA Editor, comments are displayed in green.

6. Switch back to the Code window, and then paste the copied text between the Private Sub LastName_AfterUpdate() and End Sub statements.



7. On the **File** menu, click **Save VBA** to save your changes.

8. On the **File** menu, click **Close and Return to Microsoft Access** to return to the Access window. Then close the **Property Sheet** pane.

New Record

9. Switch to Form view. On the **Navigation** bar, click the **New Record** button.

   A blank Customers form appears.

10. In the new record, press the Tab key to move the insertion point to the **FirstName** box, type **Chris**, press Tab to move to the **LastName** box, type **Sells**, and then press Tab again.

    If you followed the above steps correctly, *SELCH* appears in the CustomerID box.

11. Change the first name to Dana and the last name to Birkby.

    Notice that the original CustomerID doesn't change, even when the names from which it was derived do.

12. Press the Esc key to remove your entry, and then try entering the last name first, followed by the first name.

    Access does not create a Customer ID. The code does what it was written to do, but not necessarily what you want it to do, which is to create an ID regardless of the order in which the names are entered. There are several ways to fix this problem. For example, you could write a similar procedure to handle the After Update event in the FirstName text box, or you could write one procedure to handle both events and then jump to it when either event occurs.

13. Press Esc to clear your entries.

CLOSE the *VBA* database.

Creating a Form by Using an AutoForm

Although a form doesn't have to include all the fields from the underlying table, when it is intended as the primary method of creating new records, it usually does. The quickest way to create a form that includes all the fields from one table is to use the Form button, as you did in the first exercise in this chapter. Another method, which provides more control over the creation of the form, is to use a wizard. In either case you can easily customize the forms created.

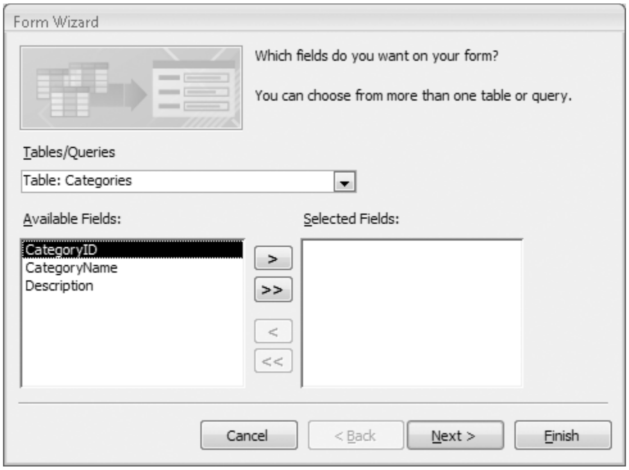
In this exercise, you will use a wizard to create a form that displays information about each of the product categories.

USE the *CreateWizard* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessSimplifying* folder.

OPEN the *CreateWizard* database. Then open the Categories table in Datasheet view.

1. On the **Create** tab, in the **Forms** group, click the **More Forms** button and then in the list, click **Form Wizard**.

   The Form wizard starts.



Move All

2. With the **Categories** table selected in the **Tables/Queries** list, click the **Move All** button to move all the table fields to the **Selected Fields** list, and then click **Next**.

   On the second page of the wizard, you choose the layout of the fields in the new form. When you click an option on the right side of the page, the preview area on the left side shows what the form layout will look like with that option applied.

3. With the **Columnar** option selected, click **Next**.

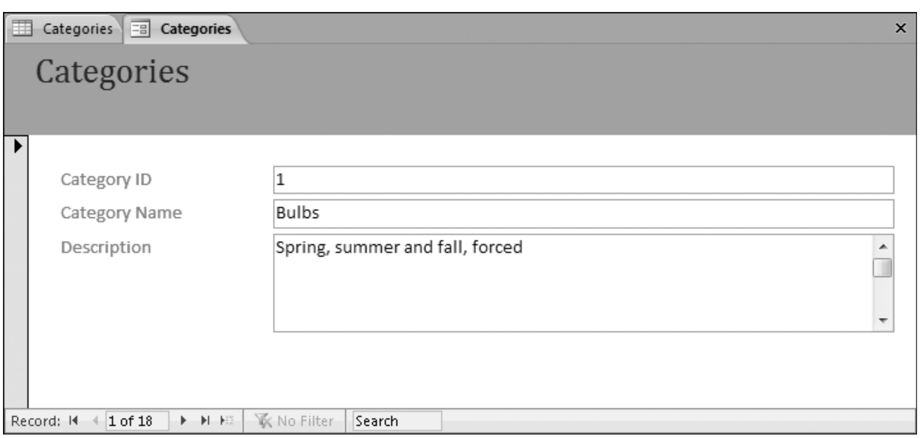
   On the third page of the wizard, you can click a style option to see how the style will look when applied to the form.

4. In the list of styles, click **Office**, and then click **Next**.

   Access suggests the base table name as the form's title.

5. With the **Open the form to view or enter information** option selected, click **Finish**.

   The new Categories form opens, displaying the first category record in the Categories table.



6. Scroll through a few records by using the navigation controls at the bottom of the form.

> **Tip** To change the style of a form after you create it, switch to Design view, and on the Arrange tab, in the AutoFormat group, click AutoFormat. In the list displayed, click the style you would like to use.

7. Switch to Design view so that you can make a few more changes.
8. Delete the word *Category* from the **Category Name** label.
9. You don't want to expose the CategoryID field to form users, because that value should never be changed. Click the **CategoryID** text box, and if the control's **Property Sheet** pane isn't open, press F4 to display it.
10. In the **Property Sheet** pane, on the **Data** tab, change **Enabled** to **No**. Then press F4 to close the **Property Sheet** pane.

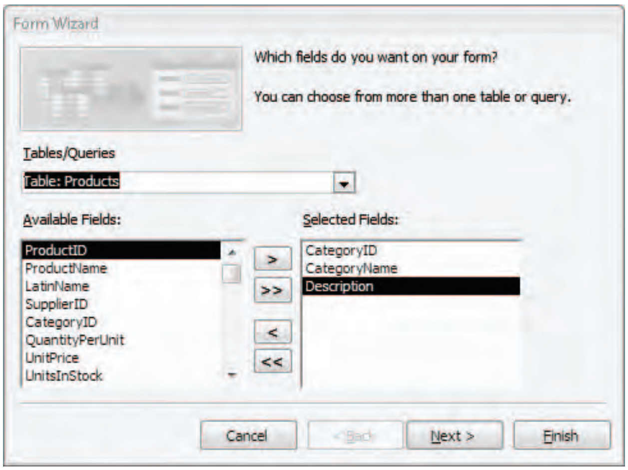
    Disabling the CategoryID text box changes it, and the label text, to gray.
11. Switch to Form view, and then scroll through a few categories. Try to edit entries in the **CategoryID** field to confirm that you can't.
12. You don't need scroll bars or a record selector in this form, so return to Design view, and then display the form's **Property Sheet** pane by clicking the **Form selector** (the box in the upper-left corner) and pressing F4.
13. In the **Property Sheet** pane, on the **Format** tab, change **Scroll Bars** to Neither and **Record Selectors** to No. Then close the **Property Sheet** pane.
14. Switch to Form view to see the effect of your changes.

> **CLOSE** the Categories form, saving your changes, and then close the *CreateWizard* database.

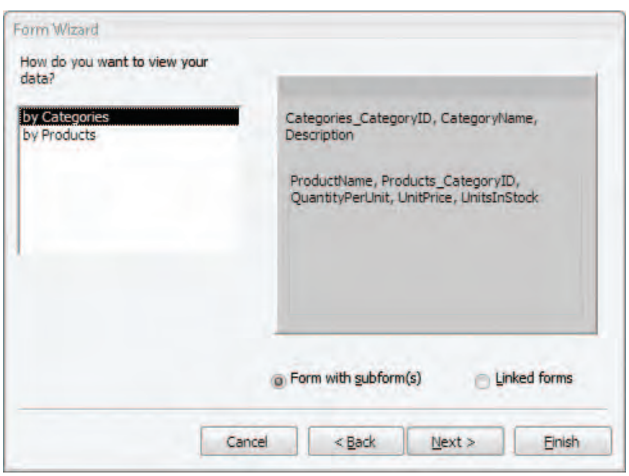
Simultaneously Creating Forms and Subforms

If you know when you create a form that you are going to add a subform, you can create the form and its subform by using the Form Wizard. To do so:

1. On the **Create** tab, in the **Forms** group, click the **More Forms** button, and then in the list, click **Form Wizard**.
2. In the **Form Wizard**, in the **Tables/Queries** list, click the table on which you want to base the form. Then click the **Move All** button to include all the table fields in the new form.
3. In the **Tables/Queries** list, click the table on which you want to base the subform.



4. In the **Available Fields** list, double-click the fields you want to include in the subform to move them to the **Selected Fields** list, and then click **Next**.



5. With your primary table and **Form with subform(s)** selected, click **Next**.

6. With **Datasheet** selected, click **Next**.
7. On the last page of the wizard, click a style, and then click **Finish**.

   The wizard creates and opens the form and subform.

You can edit the form created by the Form Wizard to suit your needs.

If there is only one one-to-many relationship between the tables you want to include in the form, and that relationship has been defined in the Relationships window, the fastest way to create the form and its subform is by using the Form tool. Simply select the primary table, and then on the Create tab, in the Forms group, click Form.

The Form tool creates and displays a form and subform, each containing all the fields of its source table.

> **Troubleshooting** If the relationship between the selected tables has not been defined, Access displays a message containing a link to the Relationships window. If this occurs, you will need to define the relationship and then restart the wizard.

Adding a Subform to a Form

A form can display information (fields) from one or more tables or queries. If you want to display fields from several tables or queries in one form, you have to give some thought to the relationships that must exist between those objects.

In this exercise, you will add a subform to an existing form.

USE the *AddSubform* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessSimplifying* folder.

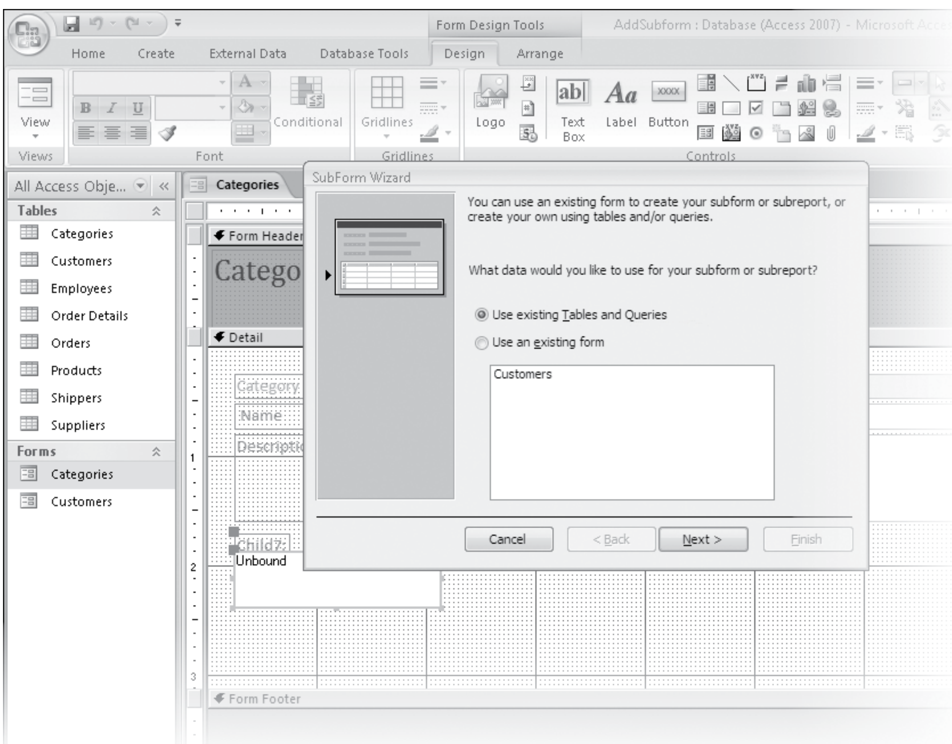
OPEN the *AddSubform* database. Then open the Categories form in Design view.


Use Control Wizards


Subform/ Subreport

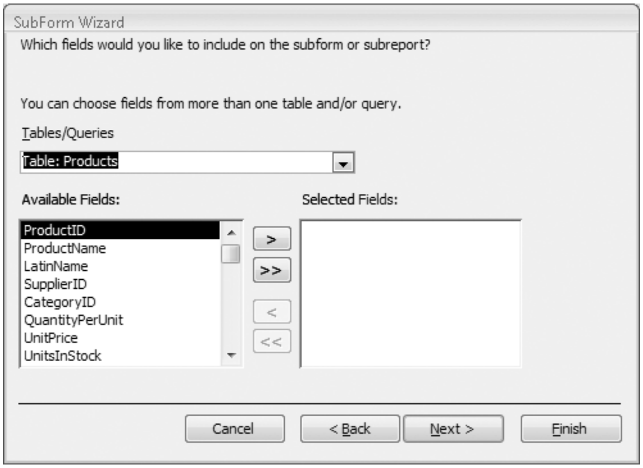
1. Drag the **Form Footer** section selector down about 1 inch to give yourself about 3 inches of vertical space to work in the **Detail** section of the form.
2. On the **Design** tab, in the **Controls** group, make sure the **Use Control Wizards** button is active (orange).
3. In the **Controls** group, click the **Subform/Subreport** button, and then drag diagonally to draw a rectangle in the lower portion of the **Detail** section.

   A white object appears in the form, and the SubForm Wizard starts.



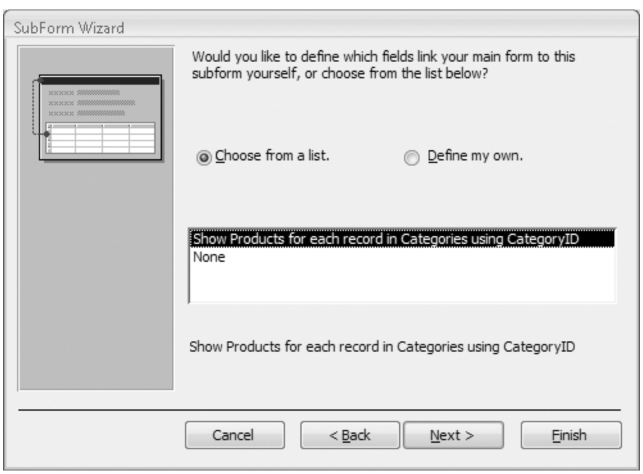
Tip If prompted to do so, follow the instructions to install this wizard.

4. With the **Use existing Tables and Queries** option selected, click **Next**.
5. In the **Tables/Queries** list, click **Table: Products**.



6. In the **Available Fields** list, double-click the **ProductName**, **CategoryID**, **QuantityPerUnit**, **UnitPrice**, and **UnitsInStock** fields to add them to the **Selected Fields** list. Then click **Next**.

   Because the CategoryID field in the subform is related to the CategoryID field in the main form, the wizard selects Show Products For Each Record In Categories Using CategoryID as the Choose From A List option.

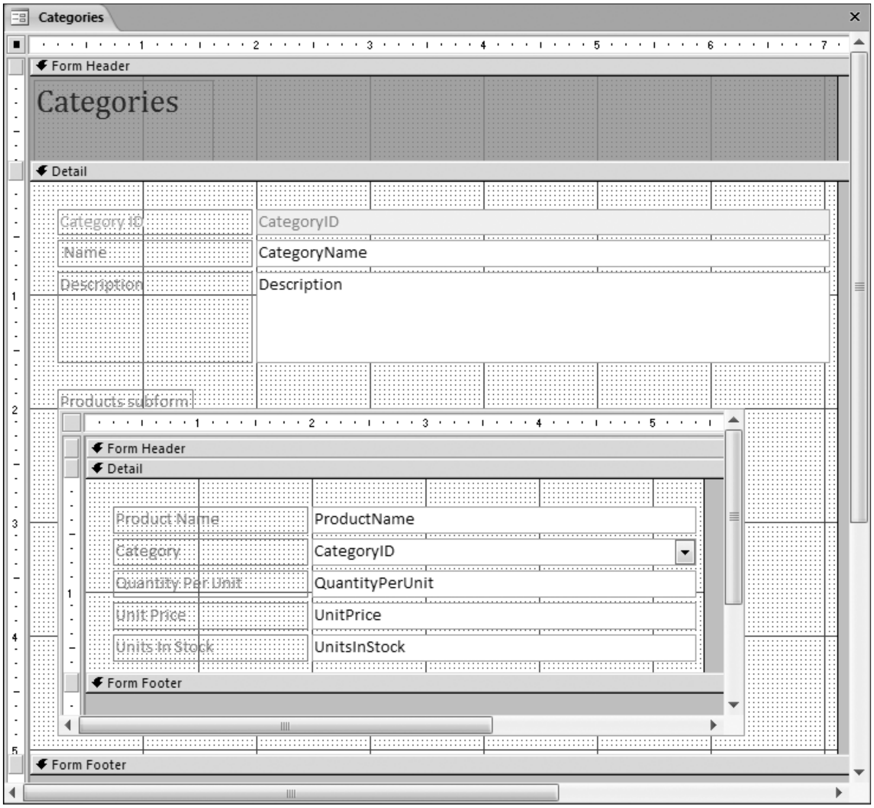


Tip If the wizard can't figure out which fields are related, it selects the Define My Own option and displays list boxes in which you can specify the fields to be related.

7. With the **Define my own** option selected, click **Finish**.

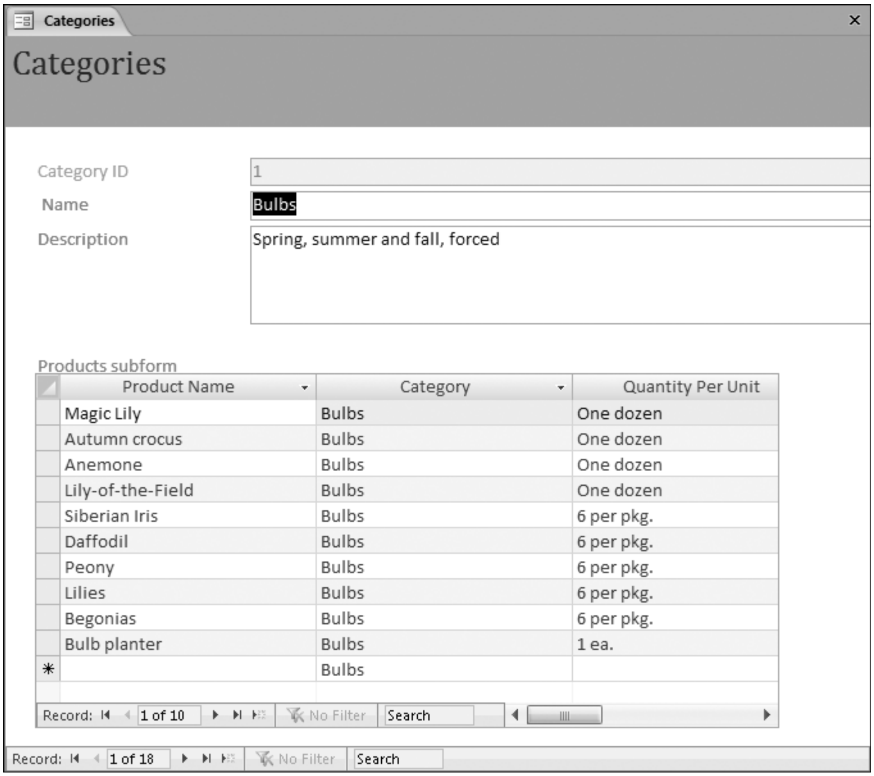
   Access displays the Categories form in Design view, with an embedded Products subform. The size and location of the subform is determined by the size and location of the original rectangle you created in the form.

8. Adjust the size and location of the objects in your form as needed to view the entire subform.




Form View

9. Notice the layout of the subform in Design view, and then on the **View** toolbar in the lower-right corner of the Access program window, click the **Form View** button to switch views.



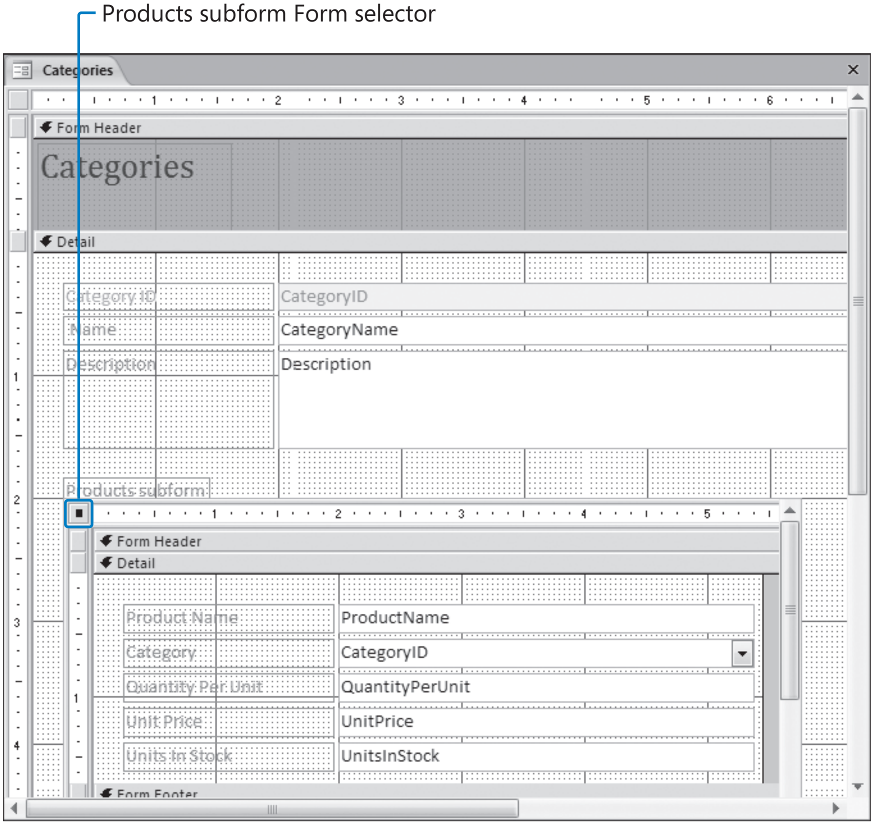
The format of the subform has totally changed. In Design view, it looks like a simple form, but in Form view, it looks like a datasheet.

10. Switch back to Design view, make any necessary size adjustments, and then open the **Property Sheet** pane if it isn't already open.

11. Click the **Form** selector in the upper-left corner of the subform twice.

    The first click selects the Products subform control, and the second click selects the form. A small black square appears on the selector.

> **Tip** You can quickly adjust the width of columns to fit their data by double-clicking the double arrow between column headings.



12. In the **Property Sheet** pane, on the **Format** tab, change the **Record Selectors** and **Navigation Buttons** properties to No.

13. Close the **Property Sheet** pane, switch back to Form view, and then adjust the width of the columns by dragging the column dividers, until you can see all the fields.

Product Name	Category	Quantity Per Unit	Unit Price	Units In
Magic Lily	Bulbs	One dozen	$40.00	40
Autumn crocus	Bulbs	One dozen	$18.75	37
Anemone	Bulbs	One dozen	$28.00	26
Lily-of-the-Field	Bulbs	One dozen	$38.00	34
Siberian Iris	Bulbs	6 per pkg.	$12.95	30
Daffodil	Bulbs	6 per pkg.	$12.95	24
Peony	Bulbs	6 per pkg.	$19.95	20
Lilies	Bulbs	6 per pkg.	$10.50	18
Begonias	Bulbs	6 per pkg.	$18.95	12
Bulb planter	Bulbs	1 ea.	$6.95	6
*	Bulbs		$0.00	0

14. Scroll through several categories by using the navigation buttons.

    As each category appears at the top of the form, the products in that category are listed in the datasheet in the subform.

First Record

15. Click the **First Record** button to return to the first category (Bulbs). In the subform click **Bulbs** in the **Category** column to the right of the first product (Magic Lily).

    The arrow at the right end of the box indicates that this is a combo box.

16. Click the arrow to display the list of categories, and then change the category to **Cacti**.

Next Record

17. Click the **Next Record** navigation button to move to the Cacti category.

    Magic Lily is now included in this category.

18. Display the category list to the right of Magic Lily, and return it to the **Bulbs** category.

19. To prevent people from changing a product's category, return to Design view, click the **CategoryID** text box control in the subform, and then press Del.

    The CategoryID text box and its label no longer appear on the form.

> **Important** You included the CategoryID field when the wizard created this subform because it is the field that relates the Categories and Products tables. The underlying Products table uses a combo box to display the name of the category instead of its ID number, so that combo box also appears in the subform.

20. Save the form, switch back to Form view, and then adjust the width of the subform columns and the size of the Form window until you can clearly see the fields.

	Product Name	Quantity Per Unit	Unit Price	Units In
	Magic Lily	One dozen	$40.00	40
	Autumn crocus	One dozen	$18.75	37
	Anemone	One dozen	$28.00	26
	Lily-of-the-Field	One dozen	$38.00	34
	Siberian Iris	6 per pkg.	$12.95	30
	Daffodil	6 per pkg.	$12.95	24
	Peony	6 per pkg.	$19.95	20
	Lilies	6 per pkg.	$10.50	18
	Begonias	6 per pkg.	$18.95	12
	Bulb planter	1 ea.	$6.95	6
*			$0.00	0

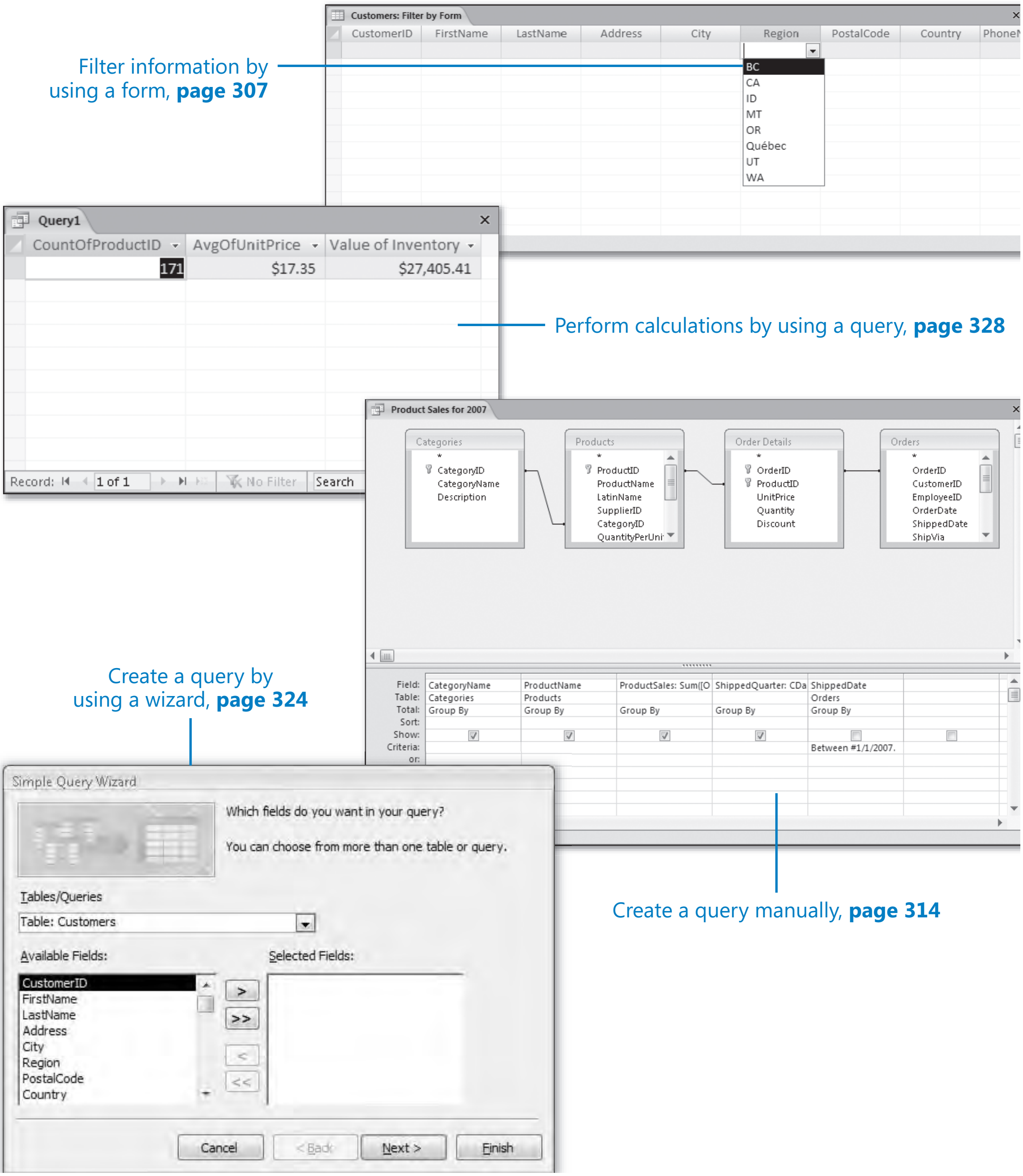
CLOSE the *AddSubform* database, and if you are not continuing directly on to the next chapter, exit Access.

Key Points

- A form is an organized and formatted view of some or all of the fields from one or more tables or queries. Forms work interactively with the tables in a database. You use controls in the form to enter new information, to edit or remove existing information, or to locate information.
- The quickest way to create a form that includes all the fields from one table is by using the Form tool. You can easily customize the form later in Design view.
- When you know what table to base your form on, and have an idea of how the form will be used, you can use the Form Wizard to quickly create a form. You can make modifications to the form in Design view.
- The two most common views to work with forms in are Form view, in which you view or enter data, and Design view, in which you add controls, change form properties, and change the form layout.
- Each text box in a form is bound to a specific field in the underlying table. The table is the record source and the field is the control source. Each control has a number of properties, such as font style, font size, and font color, which you can change to improve a form's appearance.

- You can resize the three basic sections of a form: the Form Header, Detail, and Form Footer. You can customize any section of your form's layout by adding and deleting labels, moving labels and text controls, and adding logos and other graphics. The most popular controls are available in the Controls group on the Design tab.
- The objects in your form can recognize and respond to events, which are essentially actions. But without a macro or VBA procedure attached to it, an event doesn't actually do anything. Knowing how to handle events can greatly increase the efficiency of objects, such as forms.
- If you want to display fields from several tables or queries in one form, you have to give some thought to the relationships that must exist between those objects. In Access, a relationship is an association between common fields in two tables, and you can relate the information in one table to the information in another table. There are three types of relationships that Access recognizes: one-to-one, one-to-many, and many-to-many.
- After you define a relationship between tables, you can add subforms to your forms. For example, for each category displayed in your main form, you might have a subform that displays all the products in that category.

Chapter at a Glance



Filter information by using a form, **page 307**

Perform calculations by using a query, **page 328**

Create a query by using a wizard, **page 324**

Create a query manually, **page 314**

11 Locating Specific Information

In this chapter, you will learn to:

- ✔ Sort and filter information in a table.
- ✔ Filter information by using a form.
- ✔ Locate information that matches multiple criteria.
- ✔ Create a query manually or by using a wizard.
- ✔ Perform calculations by using a query.

A database is a repository for information. It might contain only a few records or thousands of records, stored in one table or multiple tables. No matter how much information a database contains, it is useful only if you can locate the information you need when you need it. In a small database you can find information simply by scrolling through a table until you find what you are looking for. But as a database grows in size and complexity, locating and analyzing information becomes more difficult.

Microsoft Office Access 2007 provides a variety of tools you can use to organize the display of information stored in a database and to locate specific items of information. Using these tools, you can organize all the records in a table by quickly ***sorting*** it based on any field or combination of fields, or you can ***filter*** the table so that information containing some combination of characters is displayed or excluded from the display. With a little more effort, you can create queries to display specific fields from specific records from one or more tables. You can save queries and run the saved queries to generate updated results when data changes.

In this chapter, you will learn how to sort and filter information in a table, display selected information in a form; and locate information that matches multiple criteria. Then you will create queries to locate information and to perform calculations.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Sorting Information in a Table

You can sort the information stored in a table based on the values in one or more fields, in either ascending or descending order. For example, you could sort customer information alphabetically by last name and then by first name. This would result in the order found in telephone books, as shown here:

Last	First
Smith	Denise
Smith	James
Smith	Jeff
Thompson	Ann
Thompson	Steve

Sorting a table groups all entries of one type together, which can be useful. For example, to qualify for a discount on postage, you might want to group customer records by postal code before printing mailing labels.

How Access Sorts

The concept of sorting seems quite intuitive, but sometimes your computer's approach to such a concept is not so intuitive. Sorting numbers is a case in point. In Access, numbers can be treated as text or as numerals. Because of the spaces, hyphens, and punctuation typically used in street addresses, postal codes, and telephone numbers, the numbers in these fields are usually treated as text, and sorting them follows the logic applied to sorting all text. Numbers in a price or quantity field, on the other hand, are typically treated as numerals.

When Access sorts text, it sorts first on the first character in the selected field in every record, then on the next character, then on the next, and so on—until it runs out of characters. When Access sorts numbers, it treats the contents of each field as one value, and sorts the records based on that value. This tactic can result in seemingly strange sort orders. For example, sorting the list in the first column of the following table as text produces the list in the second column. Sorting the same list as numerals produces the list in the third column.

Original	Sort as text	Sort as numerals
1	1	1
1234	11	3
23	12	4
3	1234	11
11	22	12
22	23	22
12	3	23
4	4	1234

If a field with the Text data type contains numbers, you can sort the field numerically by padding the numbers with leading zeros so that all entries are the same length. For example, 001, 011, and 101 are sorted correctly even if the numbers are defined as text.

In this exercise, you will sort records first by one field, and then by multiple fields.

USE the *SortTable* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessLocating* folder.

BE SURE TO start Access before beginning this exercise.

OPEN the *SortTable* database.

1. In the **Navigation Pane**, in the **Tables** list, double-click **Customers**.

   The Customers table opens in Datasheet view.

Customers

CustomerID	FirstName	LastName	Address	City	Region	PostalCode	Country	Phone
ACKPI	Pilar	Ackerman	8808 Backbay S	Bellevue	WA	88004	USA	(425)
ADATE	Terry	Adams	1932 52nd Ave.	Vancouver	BC	V4T 1Y9	Canada	(604)
ALLMI	Michael	Allen	130 17th St.	Vancouver	BC	V4T 1Y9	Canada	(604)
ASHCH	Chris	Ashton	89 Cedar Way	Redmond	WA	88052	USA	(425)
BANMA	Martin	Bankov	78 Riverside Dr	Woodinville	WA	88072	USA	(425)
BENPA	Paula	Bento	6778 Cypress P	Oak Harbor	WA	88277	USA	(360)
BERJO	Jo	Berry	407 Sunny Way	Kirkland	WA	88033	USA	(425)
BERKA	Karen	Berg	PO Box 69	Yakima	WA	88902	USA	(509)
BOSRA	Randall	Boseman	55 Grizzly Peak	Butte	MT	49707	USA	(406)
BRETE	Ted	Bremer	311 87th Pl.	Beaverton	OR	87008	USA	(503)
BROKE	Kevin F.	Browne	666 Fords Land	Seattle	WA	88121	USA	(206)
CAMDA	David	Campbell	22 Market St.	San Francisco	CA	84112	USA	(415)
CANCH	Chris	Cannon	89 W. Hilltop D	Palo Alto	CA	84306	USA	(415)
CHANE	Neil	Charney	1842 10th Aven	Sidney	BC	V7L 1L3	Canada	(604)
CLAMO	Molly	Clark	785 Beale St.	Sidney	BC	V7L 5A6	Canada	(604)
COLPA	Pat	Coleman	876 Western A	Seattle	WA	88119	USA	(206)
CORCE	Cecilia	Cornejo	778 Ancient Rd	Bellevue	WA	88007	USA	(425)
COXBR	Brian	Cox	14 S. Elm Dr.	Moscow	ID	73844	USA	(208)
CULSC	Scott	Culp	14 E. University	Seattle	WA	88115	USA	(206)
DANMI	Mike	Danseglio	55 Newton	Seattle	WA	88102	USA	(206)
DANRY	Ryan	Danner	33 Neptune Cir	Langley	WA	88260	USA	(360)
DOYPA	Patricia	Doyle	1630 Hillcrest V	Carmel Valley	CA	83924	USA	(408)
ERIGA	Gail A.	Erickson	908 W. Capital	Tacoma	WA	88405	USA	(253)
ESTMO	Modesto	Estrada	511 Lincoln Ave	Burns	OR	87710	USA	(503)
FENHA	Hanying	Feng	537 Orchard Av	Victoria	BC	[illegible]	Canada	(604)

Record: 1 of 110 No Filter Search

2. Click the arrow at the right side of the **Region** column header, and then click **Sort A to Z**.

   Access rearranges the records in alphabetical order by region and displays a narrow upward-pointing arrow at the right side of the column header to indicate the sort order.

Descending

3. To reverse the sort order by using a different method, on the **Home** tab, in the **Sort & Filter** group, click the **Descending** button.

   The sort order reverses. The records for customers living in Washington (WA) are now at the top of your list. In both sorts, the region was sorted alphabetically, but the City field was left in a seemingly random order.

Suppose that you want to see the records arranged by city within each region. You can do this by sorting the City column and then the Region column, or by moving the Region column to the left of the City column, selecting both, and then sorting them together.

> **Tip** Access can sort on more than one field, but it sorts consecutively from left to right. So the fields you want to sort must be adjacent, and they must be arranged in the order in which you want to sort them.

4. To sort the cities in ascending order within the regions, first click the **City** sort order arrow, and then click **Sort A to Z**.

   Access sorts the records alphabetically by city.

5. To finish the process, right-click anyplace in the **Region** column, and then click **Sort A to Z**.

   The two columns are now sorted so the cities in each region are listed in ascending order.

6. To sort both columns at the same time in descending order, move the **Region** field to the left of the **City** field by clicking its header to select the column and then dragging the column to the left until a dark line appears between **Address** and **City**. Release the mouse button to complete the move operation.
7. With the **Region** column selected, hold down the Shift key and click the **City** header to extend the selection so that both the **Region** and **City** columns are selected.
8. In the **Sort & Filter** group, click the **Descending** button to arrange the records with the regions in descending order and the city names also in descending order within each region (or in this case, each state).
9. Experiment with various ways of sorting the records to display different results.

> **Tip** You can sort records while viewing them in a form. Click the field on which you want to base the sort, and then click the Sort command you want. You can't sort by multiple fields at the same time in Form view, but you can sort on one field then the next to achieve the same results.

CLOSE the Customers table without saving your changes, and then close the *SortTable* database.

Filtering Information in a Table

Sorting the information in a table organizes it in a logical manner, but you still have the entire table to deal with. To locate only the records containing (or not containing) specific information, filtering is more effective than sorting. For example, you could quickly create a filter to locate only customers who live in Seattle, only items that were purchased on January 13, or only orders that were not shipped by standard mail.

You can apply simple filters while viewing information in a table or form. To filter information by multiple criteria, you can apply additional filters to the results of the first one.

Wildcards

If you want to locate records containing certain information but aren't sure of all the characters, or want your search to return multiple variations of a base character set, you can include wildcard characters in your search criteria. The most common wildcards are listed here:

- * (asterisk) represents any number of characters. For example, *LastName* = *Co** returns entries including Colman and Conroy.
- ? (question mark) represents any single alphabetic character. For example, *FirstName* = *er??* returns entries including Eric and Erma.
- # (number sign) represents any single numeric character. For example, *ID* = *1##* returns any ID from 100 through 199.

Tip Access supports several sets of wildcards. For more information on these, search Access Help for *wildcards* and read the topic titled "Access wildcard character reference."

When searching for information in a text field, you can also use the Contains text filter to locate records containing words or character strings.

In this exercise, you will filter records by one criterion and then by multiple criteria.

Tip The Filter commands you will use in this exercise are available in the Sort & Filter group on the Home tab, on the column menu displayed when you click a column header arrow, and on the shortcut menu displayed when you right-click a column. However, not all Filter commands are available in each of these places.

USE the *FilterTable* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessLocating* folder.

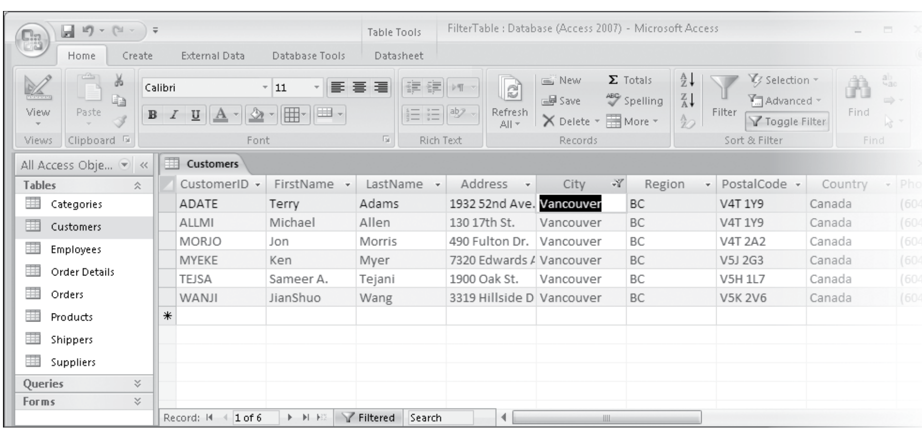
OPEN the *FilterTable* database, and then open the Customers table in Datasheet view.

1. In the **City** field, click any instance of **Vancouver**.

2. On the **Home** tab, in the **Sort & Filter** group, click the **Selection** button, and then in the list, click **Equals "Vancouver"**.

   The number of customers displayed in the table (and on the status bar at the bottom of the table) changes from *110* to *6*, because only six customers live in Vancouver.

   Access displays a small filter icon at the right side of the City column header to indicate that the table is filtered by that field. The Toggle Filter button in the Sort & Filter group and the Filter status on the status bar change to Filtered.



Important When you filter a table, Access doesn't remove the records that don't match the filter; it simply hides them.

3. In the **Sort & Filter** group, click the **Toggle Filter** button.

   Access removes the filter and displays all the records. If you click the Toggle Filter button again, the last filter used will be reapplied.

   Suppose that you want a list of all customers with postal codes starting with *880*.

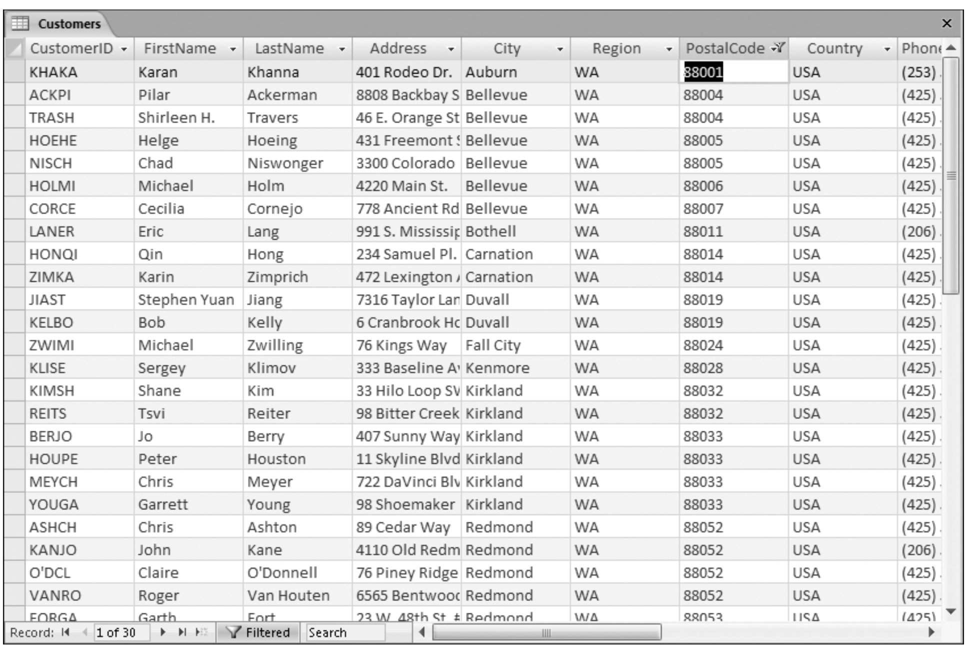
4. Click the **PostalCode** column header arrow, point to **Text Filters**, and then click **Begins With**.

> **Tip** The sort and filter options displayed when you click the column header arrow are determined by the field type. If this were a numeric field, then the submenu would be Number Filters, and different options would be listed. U.S. Zip Codes and international postal codes are usually text fields to allow for the ZIP+4 codes.

The Custom Filter dialog box opens.

5. In the **PostalCode begins with** box, type 880. Then click **OK**.

   The filtered table includes 30 records that have postal codes starting with *880*.



CustomerID	FirstName	LastName	Address	City	Region	PostalCode	Country	Phone
KHAKA	Karan	Khanna	401 Rodeo Dr.	Auburn	WA	88001	USA	(253)
ACKPI	Pilar	Ackerman	8808 Backbay S	Bellevue	WA	88004	USA	(425)
TRASH	Shirleen H.	Travers	46 E. Orange St	Bellevue	WA	88004	USA	(425)
HOEHE	Helge	Hoeing	431 Freemont S	Bellevue	WA	88005	USA	(425)
NISCH	Chad	Niswonger	3300 Colorado	Bellevue	WA	88005	USA	(425)
HOLMI	Michael	Holm	4220 Main St.	Bellevue	WA	88006	USA	(425)
CORCE	Cecilia	Cornejo	778 Ancient Rd	Bellevue	WA	88007	USA	(425)
LANER	Eric	Lang	991 S. Mississip	Bothell	WA	88011	USA	(206)
HONQI	Qin	Hong	234 Samuel Pl.	Carnation	WA	88014	USA	(425)
ZIMKA	Karin	Zimprich	472 Lexington	Carnation	WA	88014	USA	(425)
JIAST	Stephen Yuan	Jiang	7316 Taylor Lar	Duvall	WA	88019	USA	(425)
KELBO	Bob	Kelly	6 Cranbrook Hc	Duvall	WA	88019	USA	(425)
ZWIMI	Michael	Zwilling	76 Kings Way	Fall City	WA	88024	USA	(425)
KLISE	Sergey	Klimov	333 Baseline A	Kenmore	WA	88028	USA	(425)
KIMSH	Shane	Kim	33 Hilo Loop SV	Kirkland	WA	88032	USA	(425)
REITS	Tsvi	Reiter	98 Bitter Creek	Kirkland	WA	88032	USA	(425)
BERJO	Jo	Berry	407 Sunny Way	Kirkland	WA	88033	USA	(425)
HOUPE	Peter	Houston	11 Skyline Blvd	Kirkland	WA	88033	USA	(425)
MEYCH	Chris	Meyer	722 DaVinci Blv	Kirkland	WA	88033	USA	(425)
YOUGA	Garrett	Young	98 Shoemaker	Kirkland	WA	88033	USA	(425)
ASHCH	Chris	Ashton	89 Cedar Way	Redmond	WA	88052	USA	(425)
KANJO	John	Kane	4110 Old Redm	Redmond	WA	88052	USA	(206)
O'DCL	Claire	O'Donnell	76 Piney Ridge	Redmond	WA	88052	USA	(425)
VANRO	Roger	Van Houten	6565 Bentwood	Redmond	WA	88052	USA	(425)
FORGA	Garth	Fort	23 W. 48th St. #	Redmond	WA	88053	USA	(425)

6. In the **Sort & Filter** group, click the **Toggle Filter** button to remove the filter and display all the records.

   Suppose you want to display only those customers who live outside of the United States.

7. In the **Country** column, right-click any instance of **USA**, and then click **Does Not Equal "USA"**.

   Access displays all the customers from countries other than the United States (in this case, only Canada).

8. Remove the filter, save and close the **Customers** table, and then open the **Orders** table in Datasheet view.

9. In the **EmployeeID** field, right-click **Emanuel, Michael**, and then click **Equals "Emanuel, Michael"**.

   > **Troubleshooting** If you continued with the *SortTable* database from the previous exercise, the EmployeeID field does not list employee names. To complete this exercise, you must use the *FilterTable* database.

10. In the **OrderDate** field, right-click **2/1/2007**, and then click **On or After 2/1/2007**.

    > **Tip** To see a list of the available options for date filters, right-click any cell in the OrderDate column and then point to Date Filters.

    You now have a list of orders placed with the selected employee on or after the specified date. You could continue to refine the list by filtering on another field, or you could sort the results by a field.

    > **Tip** After you locate the information you want, you can display the results in a form or report. To do so, on the Create tab, click the object you want to create.

CLOSE the Orders table without saving changes, and then close the *FilterTable* database.

> **Tip** You can filter records while displaying them in a form by using the same commands as you do to filter forms in a table.

Expressions

In Access lingo, ***expressions*** are synonymous with *formulas*. An expression is a combination of ***operators***, ***constants***, ***functions***, and ***control properties*** that evaluates to one value. Access builds formulas using the format *a=b+c*, where *a* is the ***result*** and *=b+c* is the expression. You can use an expression to assign properties to tables or forms, to determine values in fields or reports, as part of queries, and so on.

The expressions you use in Access combine multiple criteria to define a set of conditions that a record must meet to be included in the result of a filter or query. Multiple criteria are combined using logical, comparison, and arithmetic operators. Different types of expressions use different operators.

The most common ***logical operators*** are:

- And. This operator selects records that meet all the specified criteria.
- Or. This operator selects records that meet at least one of the criteria.
- Not. This operator selects records that don't match the criteria.

Common ***comparison operators*** include:

- < (less than)
- > (greater than)
- = (equal to)

You can combine these basic operators to form:

- <= (less than or equal to)
- >= (greater than or equal to)
- <> (not equal to)

The Like operator is sometimes grouped with the comparison operators and is used to test whether or not text matches a pattern.

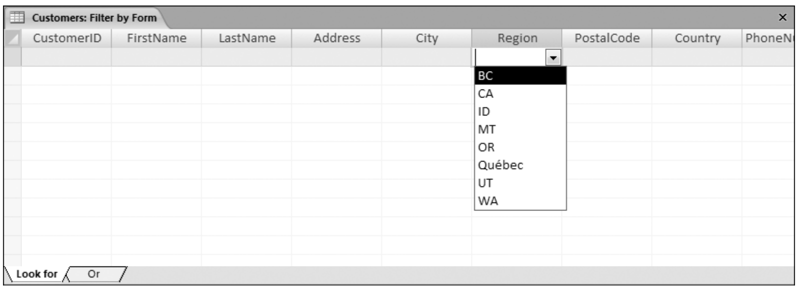
You use ***arithmetic operators*** with numerals. The most common are:

- + (add)
- - (subtract)
- * (multiply)
- / (divide)

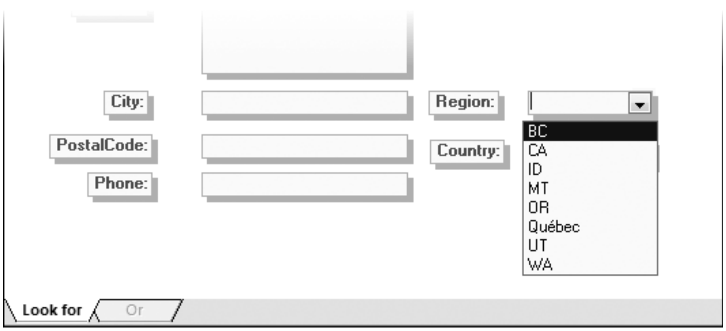
A related operator, & (a text form of +) is used to concatenate (combine) two text strings.

Filtering Information by Using a Form

The Filter By Form command, available from the Advanced Filter Options list, provides a quick and easy way to filter a table based on the information in several fields. When you invoke this command within a table, Access displays a Look For tab containing a filtering form that looks like an empty datasheet. However, each of the blank cells is actually a combo box containing a list of all the entries in that field. You can select a filter criterion from the list or enter a new one. Then you click the Toggle Filter button to display only the records containing your selected criteria.



Using Filter By Form on a table that has only a few fields, such as the one shown above, is easy. But using it on a table that has a few dozen fields gets a bit cumbersome, and it is simpler to find information by using the Filter By Form command in the form version of the table. When you invoke this command within a form, Access filters the form in the same way it filters a table.



In a filtered form, you move between records by clicking the navigation buttons at the bottom of the form window.

> **Tip** Filter By Form offers the same features and techniques whether you are using it in a form or a table. Because defining the filter is sometimes easier in a form and viewing the results is sometimes easier in a table, you might consider creating a simple form based on the table, filtering the data within the form, and then switching to Datasheet view to display the results.

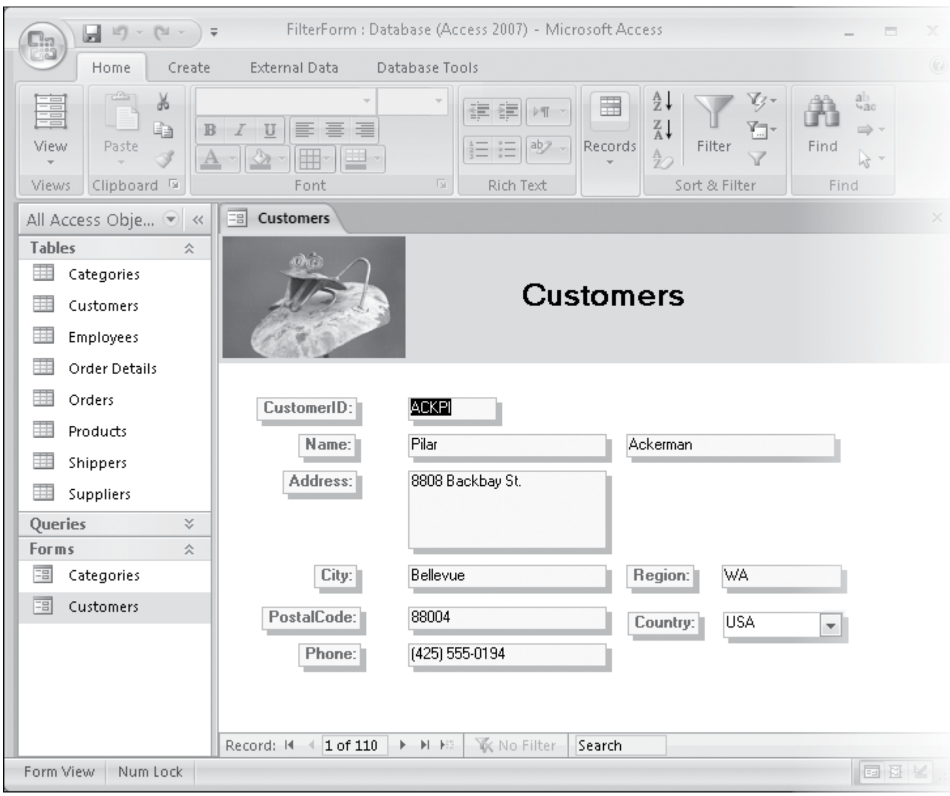
In this exercise, you will locate a record by using the Filter By Form command.

USE the *FilterForm* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessLocating* folder.

OPEN the *FilterForm* database.

1. In the **Navigation Pane**, in the **Forms** list, double-click **Customers**.

   The Customers form opens in Form view.



2. On the **Home** tab, in the **Sort & Filter** group, click the **Advanced** button, and then in the list, click **Filter By Form**.

   The Customers form, which displays the information from one record, is replaced by its Filter By Form version, which has a blank box for each field and the Look For and Or tabs at the bottom.

3. Click the second text box to the right of the **Name** label (the box intended to contain the surname), type s*, and then press Enter.

Access converts your entry to the proper format, or *syntax*, for this type of expression: *Like "s*"*.

4. In the **Sort & Filter** group, click the **Toggle Filter** button.

   Access displays all records that include last names starting with *S*.

5. Click the **Advanced** button and then **Filter By Form** again to switch back to the filter form.

   Your filter criteria are still displayed. When you enter filter criteria using any method, they are saved as a form property and are available until they are replaced by other criteria.

6. Click the box to the right of **Region**, click the arrow that appears, and then in the list, click **CA**.

7. Click the **Toggle Filter** button to see only the customers living in California whose last names begin with *S*.

   Access replaces the filter window with the regular Customers form, and the status bar at the bottom of the form indicates that three filtered records are available.

8. Click the **Advanced** button and then **Filter By Form** again to switch back to the filter form.
9. At the bottom of the form window, click the **Or** tab.

> **Tip** Criteria you enter on the Look For tab are joined with the And operator to reduce the number of possible hits in the underlying table. Criteria entered on the Or tabs tend to increase the number of hits.

This tab has the same blank cells as the Look For tab. You can switch between the two tabs to confirm that your criteria haven't been cleared.

> **Tip** When you display the Or tab, a second Or tab appears so that you can include a third criterion if you want.

10. Type **s*** in the **LastName** box, type or click **WA** in the **Region** box, and then click the **Toggle Filter** button.

    You can scroll through the filtered Customers form to view the six records containing WA in the Region field.

CLOSE the Customers form and the *FilterForm* database.

Locating Information That Matches Multiple Criteria

The filtering methods discussed earlier in this chapter are quick and easy ways to narrow down the amount of information displayed, as long as your filter criteria are fairly simple. But suppose you need to locate something more complex, such as all the orders shipped to Midwest states between specific dates by either of two shippers. When you need to search a table for records that meet multiple criteria, or with criteria based on complex expressions, you can use the Advanced Filter/Sort command, available from the Advanced Filter Options list.

You work with the Advanced Filter/Sort command in the ***design grid***.

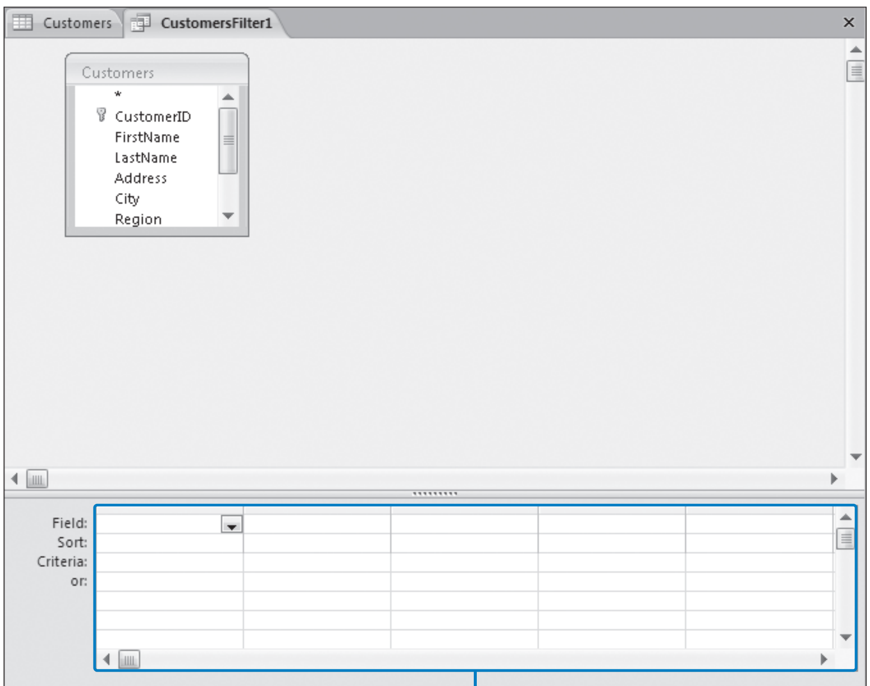
In this exercise, you will filter a table to display customers located in two states. Then you will experiment with the design grid to better understand its filtering capabilities.

USE the *MultipleCriteria* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessLocating* folder.

OPEN the *MultipleCriteria* database, and then open the Customers table in Datasheet view.

1. On the **Home** tab, in the **Sort & Filter** group, click the **Advanced** button, and then in the list, click **Advanced Filter/Sort**.

   The CustomersFilter1 query window opens, displaying the Customers field list in a floating window at the top, and the design grid at the bottom.



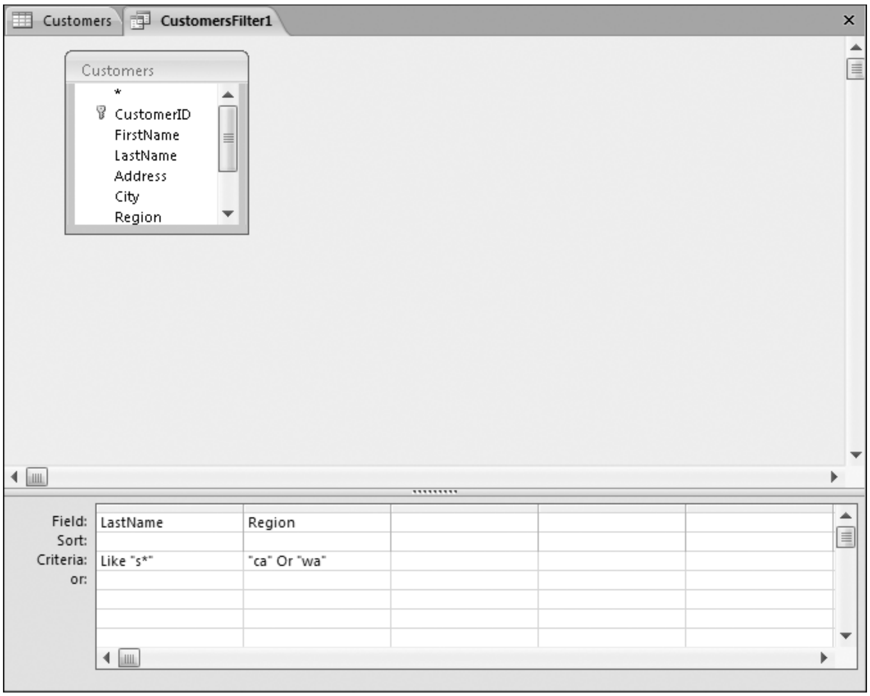
2. In the **Customers** field list, double-click **LastName** to copy it to the **Field** cell in the first column of the design grid.

3. In the **Criteria** cell under **LastName**, type s*, and then press Enter.

   Access changes the criterion to *Like "s*"*.

4. In the **Customers** field list, double-click **Region** to copy it to the next available column of the design grid.

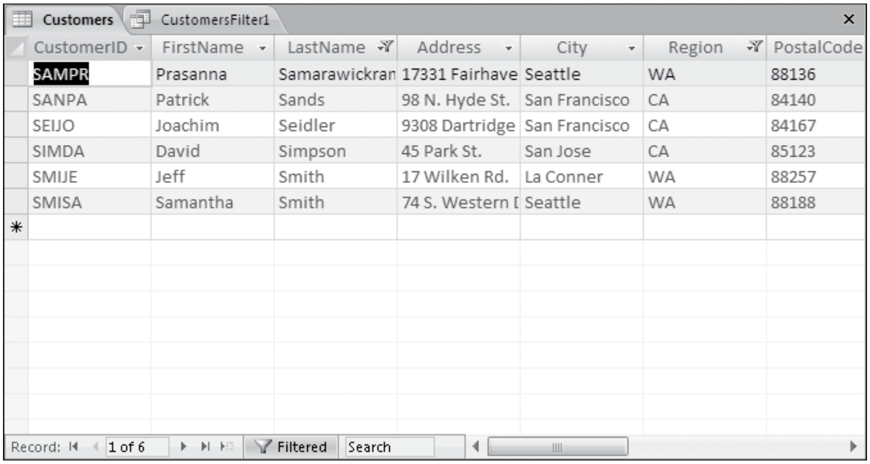
5. In the **Criteria** cell under **Region**, type ca or wa, and then press Enter.



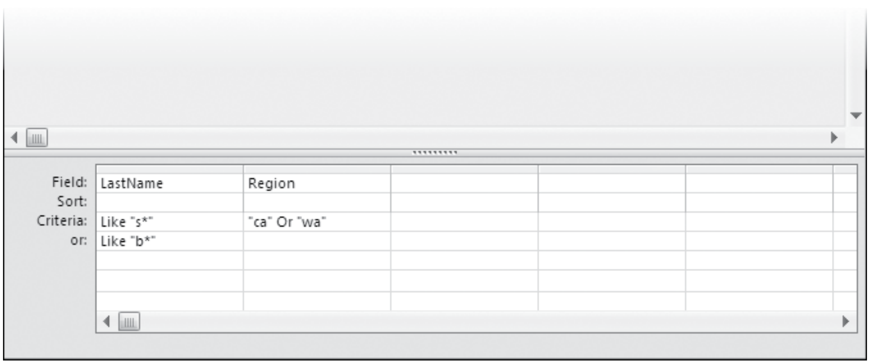
   Your entry changes to *"ca" Or "wa"*. The query will now filter the table to display only customers with last names beginning with the letter *S* who live in California or Washington.

6. In the **Sort & Filter** group, click the **Toggle Filter** button to display only records that match the criteria.

   Access switches to the Customers table and displays the query results. There are six customers with last names beginning with *S* who live in either California or Washington.



7. Click the **CustomersFilter1** tab to switch to the filter window. In the **or** cell under **LastName**, type b*, and then press Enter.



8. In the **Sort & Filter** group, click the **Toggle Filter** button.

   The result includes records for all customers with last names that begin with *S* or *B*, but some of the *B* names live in Montana and Oregon. If you look again at the design grid, you can see that the filter is formed by combining the fields in the Criteria row with the *And* operator, combining the fields in the "Or" row with the *And* operator, and then using the *Or* operator to combine the two rows. So the filter is searching for customers with names beginning with *S* who live in California or Washington, or customers with names beginning with *B*, regardless of where they live.

9. Switch to the filter window, type ca or wa in the **or** cell under **Region**, press Enter, and then apply the filter to display only customers with last names beginning with *B* or *S* located in California and Washington.

CLOSE the Customers table without saving your changes, and then close the *MultipleCriteria* database.

Creating a Query Manually

A query can do more than simply return a list of records from a table. You can use functions in a query to perform calculations on the information in a table to produce the sum, average, count, and other mathematical values.

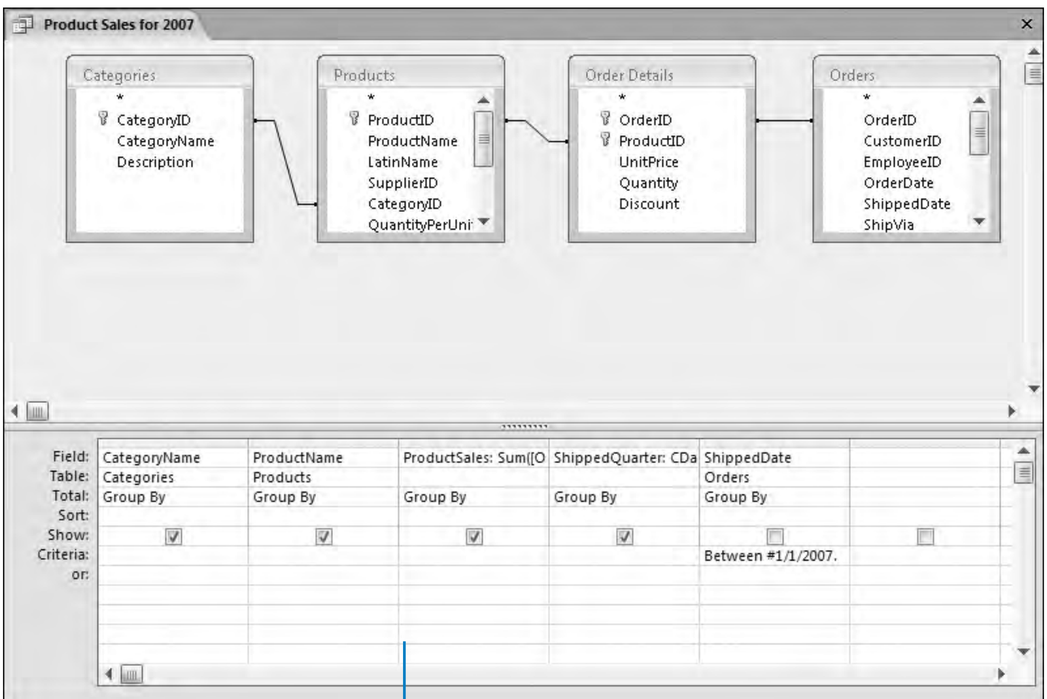
When you want to work with more than one table, you need to move beyond filters and into the realm of queries. Common types of queries include the following:

- A ***select query*** retrieves data from one or more tables and displays the results in a datasheet. You can also use a select query to group records and calculate sums, counts, averages, and other types of totals. You can work with the results of a select query in Datasheet view to update records in one or more related tables at the same time. This is the most common type of query.
- A ***duplicate query*** is a form of select query that locates records that have the same information in one or more fields that you specify. The Find Duplicates Query wizard guides you through the process of specifying the table and fields to use in the query.
- An ***unmatched query*** is a form of select query that locates records in one table that don't have related records in another table. For example, you could use this to locate people in the customer table who don't have an order in the order table. The Find Unmatched Query wizard guides you through the process of specifying the tables and fields to use in the query.
- A ***parameter query*** prompts you for information to be used in the query—for example, a range of dates. This type of query is particularly useful when used as the basis for a report that is run periodically.
- A ***crosstab query*** calculates and restructures data for easier analysis. You can use a crosstab query to calculate a sum, average, count, or other type of total for data that is grouped by two types of information—one down the left side of the datasheet and one across the top. The cell at the junction of each row and column displays the results of the query's calculation.

- An ***action query*** updates multiple records in one operation. It is essentially a select query that performs an action on the results of the selection process. Four types of actions are available:
  - ***Delete queries***, which delete records from one or more tables
  - ***Update queries***, which make changes to records in one or more tables
  - ***Append queries***, which add records from one or more tables to the end of one or more other tables
  - ***Make-table queries***, which create a new table from all or part of the data in one or more tables

> **Tip** In addition to these, you can create Structured Query Language (SQL) queries. SQL queries are beyond the scope of this book.

Access includes wizards that guide you through the creation of the common queries, but you create less common queries by hand in Design view, using the design grid.



A complex query, shown in Design view

The field lists (in the small windows at the top of the query window) list the fields in the four tables that can be included in this query. The lines connecting the tables indicate that they are related by virtue of common fields. The first row of the grid contains the names of the fields actually included in the query, and the second row shows which table each field belongs to. The third row (labeled *Total*) performs calculations on the field values, and the fourth row indicates whether the query results will be sorted on this field. A selected check box in the fifth row (labeled *Show*) means that the field will be displayed in the results datasheet. (If the check box isn't selected, the field can be used in determining the query results, but it won't be displayed.) The sixth row (labeled *Criteria*) contains criteria that determine which records will be displayed, and the seventh row (labeled *or*) sets up alternate criteria.

You can create a query by hand or by using a wizard. Regardless of what method you use to create the query, what you create is a statement describing the conditions that must be met for records to be matched in one or more tables. When you run the query, the matching records appear in a new datasheet.

Filters and Sorts vs. Queries

The major differences between filtering a table, sorting a table, and querying a table are:

- The Filter and Sort commands are usually faster to implement than queries.
- The Filter and Sort commands are not saved, or are saved only temporarily. You can save a query permanently and run it again at any time.
- The Filter and Sort commands are applied only to the table or form that is currently open. A query can be based on multiple tables and on other queries, which don't have to be open.

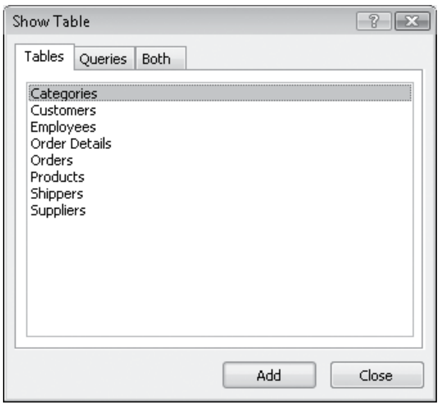
In this exercise, you will create a form based on a select query that combines information from two tables into a datasheet and calculates the extended price of an item based on the unit price, quantity ordered, and discount.

USE the *QueryDesign* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessLocating* folder.

OPEN the *QueryDesign* database.

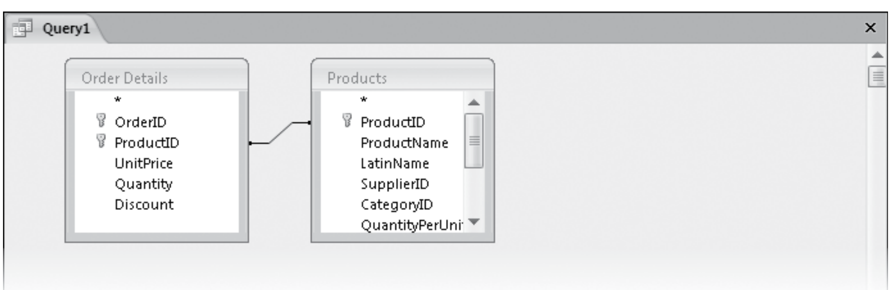
1. On the **Create** tab, in the **Other** group, click the **Query Design** button.

   A query window opens in Design view, and the Show Table dialog box opens. In this dialog box, you can specify which tables and saved queries to include in the current query.



2. In the **Show Table** dialog box, on the **Tables** tab, double-click **Order Details** and then **Products** to add each table to the query window. Then close the dialog box.

   Each of the selected tables is represented in the top portion of the window by a small field list window with the name of the table—in this case, Order Details and Products—in its title bar.



An asterisk at the top of each list represents all the fields in the list. The primary key field in each list is indicated by a key icon. The line from ProductID in the Order Details table to ProductID in the Products table indicates that these two fields are related.

> **Tip** To add more tables to a query, reopen the Show Table dialog box by right-clicking a blank space in the top portion of the query window and then clicking Show Table, or by clicking the Show Table button in the Query Setup group on the Design contextual tab.

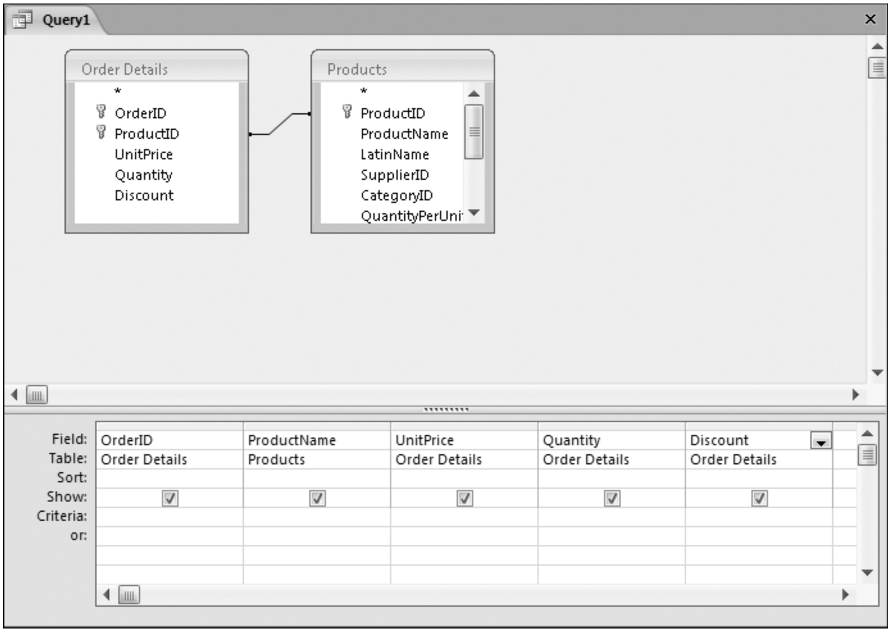
The lower area of the query window contains the design grid where you will specify the query's criteria.

3. Drag the following fields from the field lists to consecutive columns in the design grid:

From this table	Drag this field
Order Details	OrderID
Products	ProductName
Order Details	UnitPrice
Order Details	Quantity
Order Details	Discount

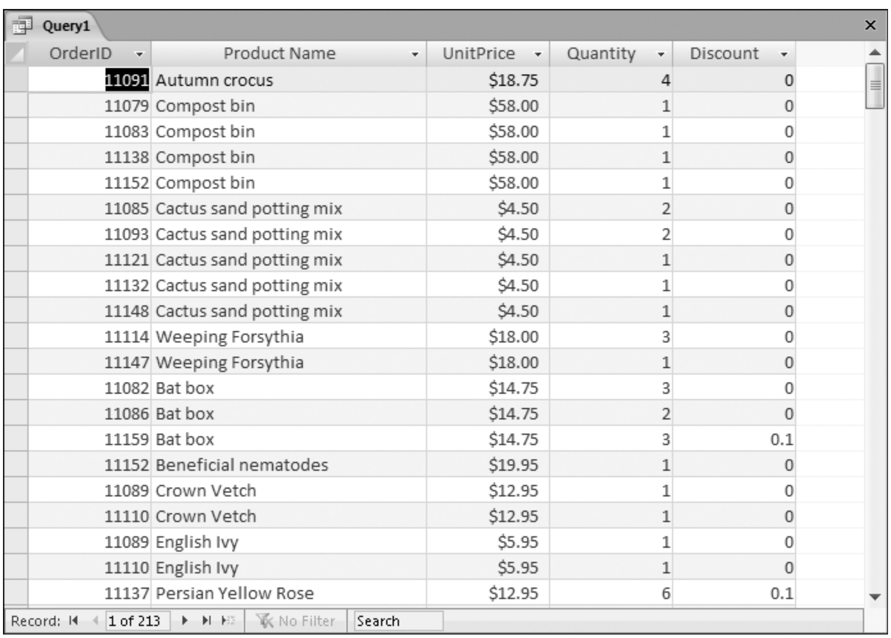
The query will include only the fields that are in the design grid.

> **Tip** You can quickly copy a field to the next available column in the design grid by double-clicking the field.
>
> To copy all fields to the grid, double-click the title bar above the field list to select the entire list, and then drag the selection over the grid. When you release the mouse button, Access adds the fields to the columns in order. You can drag the asterisk to a column in the grid to include all the fields in the query, but you also have to drag individual fields to the grid if you want to sort on those fields or add conditions to them.



4. On the **Design** contextual tab, in the **Results** group, click the **Run** button.

Access runs the query and displays the results in Datasheet view.



Query1

OrderID	Product Name	UnitPrice	Quantity	Discount
11091	Autumn crocus	$18.75	4	0
11079	Compost bin	$58.00	1	0
11083	Compost bin	$58.00	1	0
11138	Compost bin	$58.00	1	0
11152	Compost bin	$58.00	1	0
11085	Cactus sand potting mix	$4.50	2	0
11093	Cactus sand potting mix	$4.50	2	0
11121	Cactus sand potting mix	$4.50	1	0
11132	Cactus sand potting mix	$4.50	1	0
11148	Cactus sand potting mix	$4.50	1	0
11114	Weeping Forsythia	$18.00	3	0
11147	Weeping Forsythia	$18.00	1	0
11082	Bat box	$14.75	3	0
11086	Bat box	$14.75	2	0
11159	Bat box	$14.75	3	0.1
11152	Beneficial nematodes	$19.95	1	0
11089	Crown Vetch	$12.95	1	0
11110	Crown Vetch	$12.95	1	0
11089	English Ivy	$5.95	1	0
11110	English Ivy	$5.95	1	0
11137	Persian Yellow Rose	$12.95	6	0.1

Record: 1 of 213 No Filter Search

The results show that the query is working thus far. There are two things left to do: sort the results on the OrderID field and add a field for calculating the extended price, which is the unit price times the quantity sold minus any discount.

5. Switch to Design view.

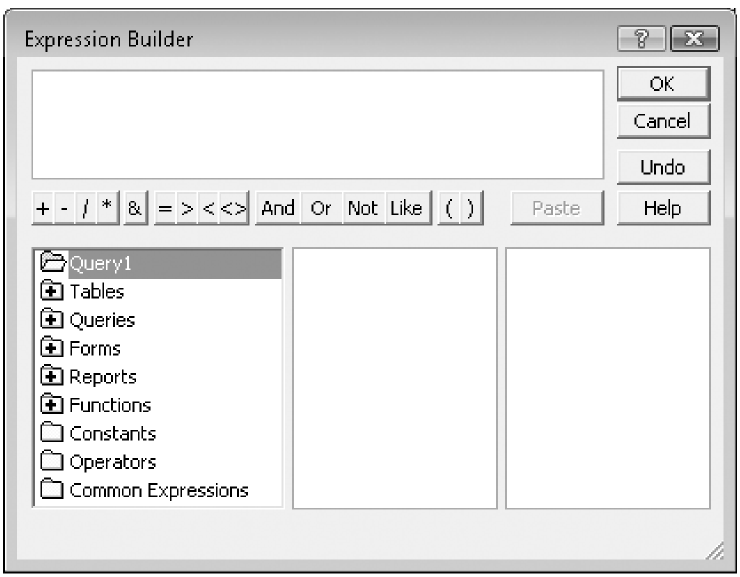
   The third row in the design grid is labeled Sort. You can click Ascending, Descending, or (not sorted) in this cell for any of the query fields.

6. In the **OrderID** column, click the **Sort** arrow, and then in the list, click **Ascending**.

   Neither of the tables includes an extended price field. Rather than creating the field in a table, you will use the Expression Builder to insert an expression in the design grid that computes this price from existing information.

7. Right-click the **Field** cell in the first blank column in the design grid (the sixth column), and then click **Build**.

   The Expression Builder dialog box opens.



Here is the expression you will build:

```
CCur([Order Details]![UnitPrice]*[Order Details]![Quantity]*(1-[Order
Details]![Discount]))
```

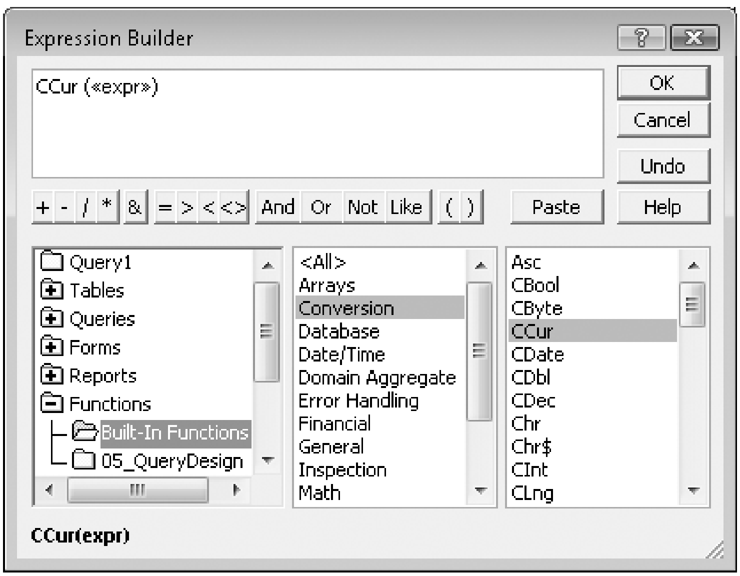
The CCur function converts the results of the math inside its parentheses to currency format.

> **Tip** If you were to type this expression directly into the field, you could simplify it a bit to this:
> ```
> ExtendedPrice: CCur([Order Details]![UnitPrice]*[Quantity]*(1-
> [Discount]))
> ```
> The [Order Details]! part is required only with fields that appear in both tables. It tells the query which table to use.

8. In the first column of the elements area, double-click the **Functions** folder to display its contents, and then click **Built-In Functions**.

   Categories of built-in functions appear in the second column; actual functions within each category appear in the third column.

9. In the second column, click **Conversion** to limit the functions in the third column to those in that category. Then in the third column, double-click **Ccur**.



   You've inserted the currency conversion function into the expression box. The *<<expr>>* inside the parentheses represents the other expressions that will eventually result in the number Access should convert to currency format.

10. In the expression box, click **<<expr>>** to select it so that the next thing you enter will replace it.

    The next element you want in the expression is the UnitPrice field from the Order Details table.

11. In the first column, double-click the **Tables** folder, and click **Order Details**. Then in the second column, double-click **UnitPrice**.

The insertion point is currently situated after UnitPrice, which is exactly where you want it. Now you want to multiply the amount in the UnitPrice field by the amount in the Quantity field.

Multiply

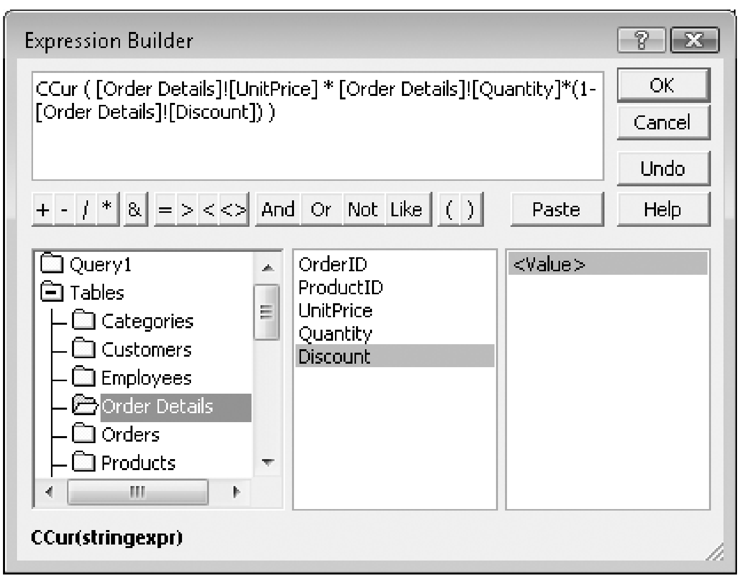
12. In the row of operator buttons below the expression box, click the **Multiply** button.

    Access inserts the multiplication sign and another <<*Expr*>> placeholder.

13. In the expression box, click **<<Expr>>** to select it, and then in the second column, double-click **Quantity**.

    What you have entered so far calculates the total cost by multiplying the price of an item by the quantity ordered. However, suppose the sale price is discounted due to quantity or another factor. The discount, which is stored in the Order Details table, is expressed as the percentage to deduct. But it is easier to compute the percentage to be paid than it is to compute the discount and subtract it from the total cost.

14. In the expression box, type *(1-. In the second column, double-click **Discount**, and type). If the entire expression isn't visible in the window, widen the window by dragging its right edge.



Although the discount is formatted in the datasheet as a percentage, it is actually stored in the database as a decimal number between 0 and 1. (For example, a discount displayed as 10% is stored as 0.1). So if the discount is 10%, the result of *(1-Discount) is *.9. In other words, the formula multiplies the unit price by the quantity and then multiplies that result by 0.9.

15. In the **Expression Builder** dialog box, click **OK**.

Access enters the expression in the design grid.

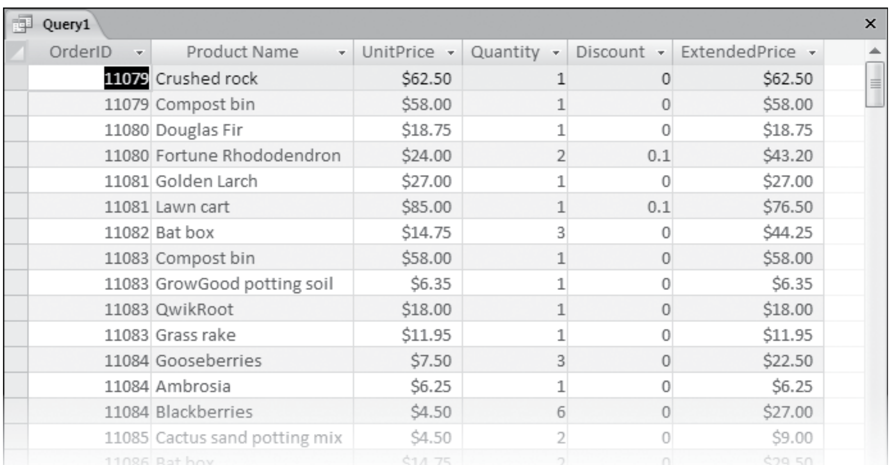
16. Press Enter to move the insertion point out of the field and complete the entry of the expression.

Access labels the expression Expr1, which isn't particularly meaningful.

> **Tip** You can quickly make a column in the design grid as wide as its contents by double-clicking the line in the gray selection bar that separates the column from the column to its right.

17. In the design grid, double-click **Expr1**, and then type ExtendedPrice as the label for the expression.

18. Switch to Datasheet view.



Query1

OrderID	Product Name	UnitPrice	Quantity	Discount	ExtendedPrice
11079	Crushed rock	$62.50	1	0	$62.50
11079	Compost bin	$58.00	1	0	$58.00
11080	Douglas Fir	$18.75	1	0	$18.75
11080	Fortune Rhododendron	$24.00	2	0.1	$43.20
11081	Golden Larch	$27.00	1	0	$27.00
11081	Lawn cart	$85.00	1	0.1	$76.50
11082	Bat box	$14.75	3	0	$44.25
11083	Compost bin	$58.00	1	0	$58.00
11083	GrowGood potting soil	$6.35	1	0	$6.35
11083	QwikRoot	$18.00	1	0	$18.00
11083	Grass rake	$11.95	1	0	$11.95
11084	Gooseberries	$7.50	3	0	$22.50
11084	Ambrosia	$6.25	1	0	$6.25
11084	Blackberries	$4.50	6	0	$27.00
11085	Cactus sand potting mix	$4.50	2	0	$9.00
11086	Bat box	$14.75	2	0	$29.50

The orders are now sorted by the OrderID field, and the extended price is calculated in the last field.

19. Scroll down to see a few records with discounts.

If you check the math, you will see that the query calculates the extended price correctly.

20. Close the query window. In the **Microsoft Office Access** message box asking whether to save the query, click **Yes**. In the **Save As** dialog box, type Order Details Extended, and then click **OK**.

CLOSE the *QueryDesign* database.

Expression Builder

To create an expression as a filter or query option, you can either type the expression or use the Expression Builder. You can open the Expression Builder by clicking Build on a shortcut menu, clicking Builder in the Query Setup group, or clicking the Build button (which resembles an ellipsis) at the right end of a box that can accept an expression.

The Expression Builder isn't a wizard; it doesn't lead you through the process of building an expression. But it does provide a hierarchical list of the most common elements that you can include in an expression. You can either type your expression in the expression box, or you can select functions, operators, and other elements to copy them to the expression box.

Creating a Query by Using a Wizard

The process of creating a simple select query by using the Query wizard is almost identical to that of creating a form by using the Form wizard. Within the Query wizard, you can build a new query based on one or more fields from existing tables or queries. You can also create Crosstab, Find Duplicates, and Find Unmatched queries with the wizard.

For Access to work effectively with multiple tables, it must understand the relationships between the fields in those tables.

See Also For more information about creating relationships, see the sidebar "Relationships" in Chapter 10, "Simplifying Data Entry by Using Forms."

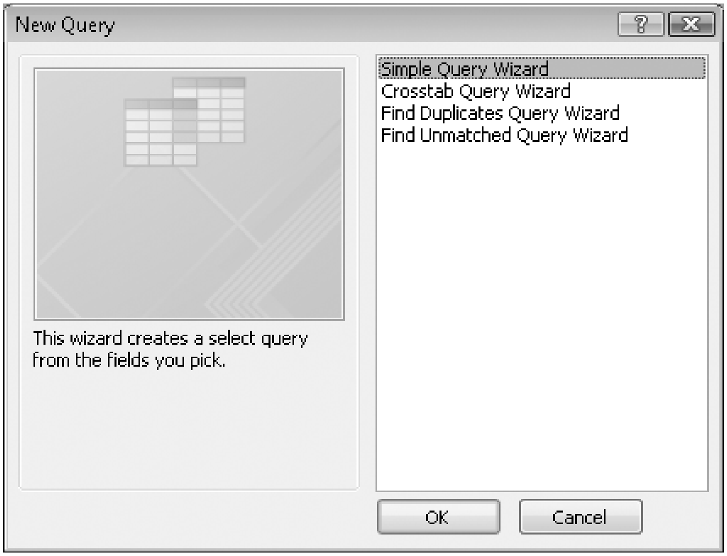
In this exercise, you will use the Query wizard to create a query that combines information from two tables related through common fields.

USE the *QueryWizard* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessLocating* folder.

OPEN the *QueryWizard* database.

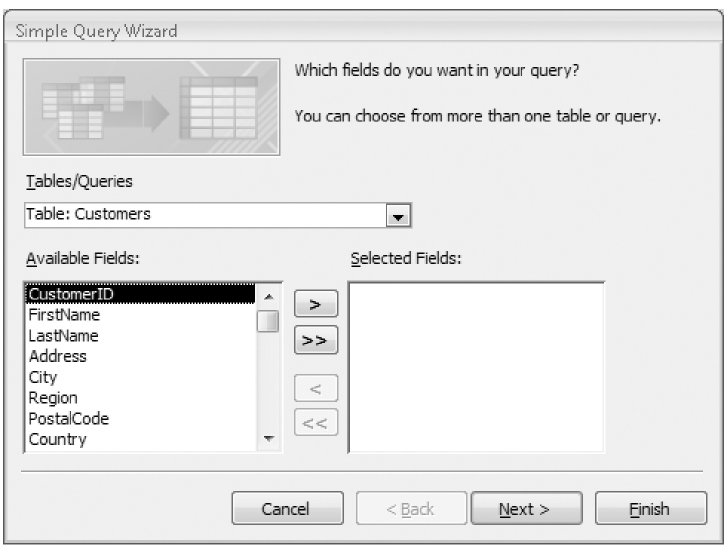
1. On the **Create** tab, in the **Other** group, click the **Query Wizard** button.

   The New Query dialog box opens.



2. With **Simple Query Wizard** selected in the list, click **OK**.

   The Simple Query Wizard starts.

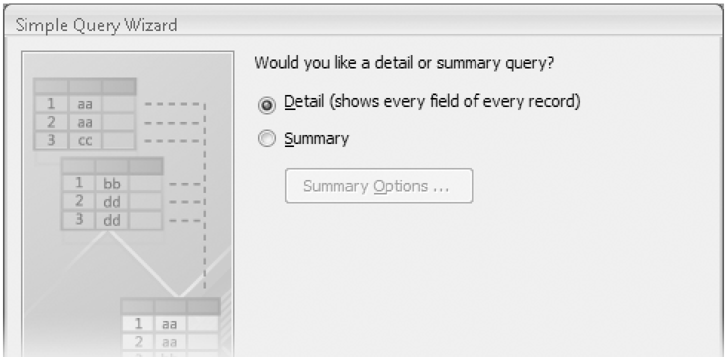


Move All

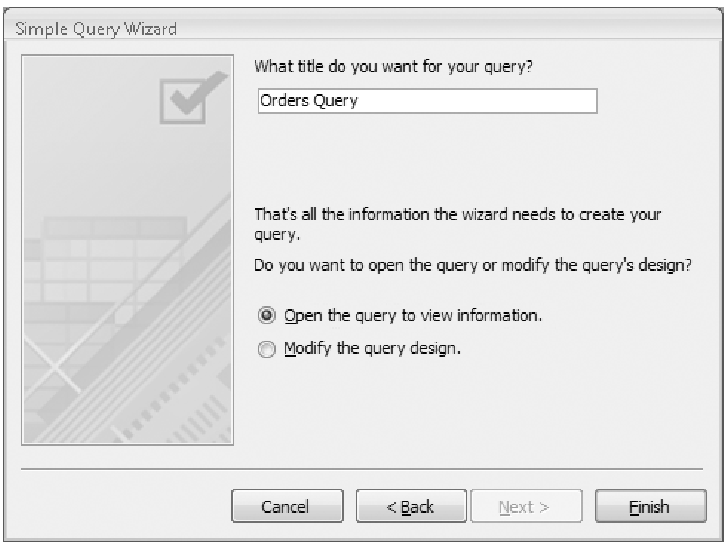
3. In the **Tables/Queries** list, click **Table: Orders**. Then click the **Move All** button to move all the fields from the **Available Fields** list to the **Selected Fields** list.

4. In the **Tables/Queries** list, click **Table: Customers.**
5. In the **Available Fields** list, double-click the **Address**, **City**, **Region**, **PostalCode**, and **Country** fields to move them to the **Selected Fields** list, and then click **Next**.

> **Tip** If the relationship between two tables hasn't already been established, you will be prompted to define it and then restart the wizard.

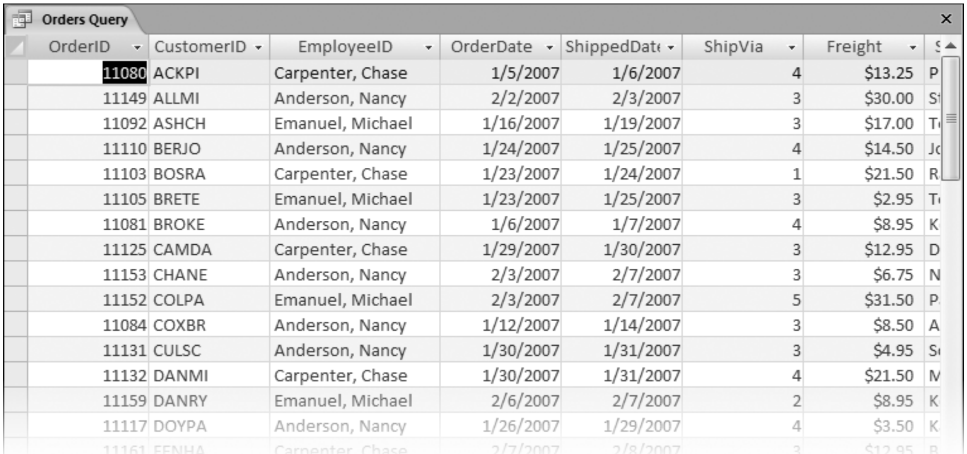


6. With the **Detail** option selected, click **Next**.

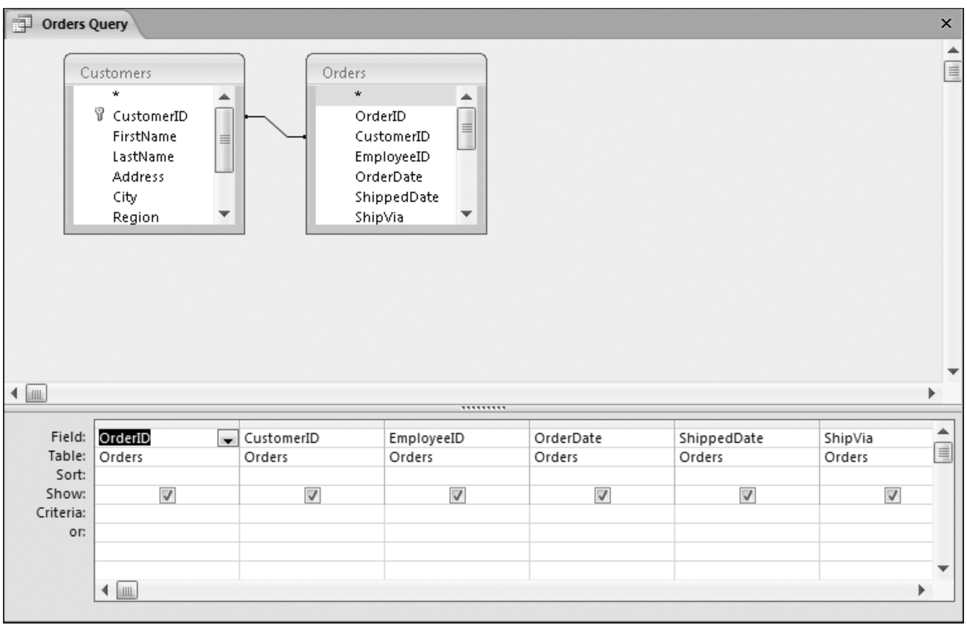


7. With the **Open the query to view information** option selected, click **Finish**.

   Access runs the query and displays the results in Datasheet view. You can scroll through the results and see that information is displayed for all the orders.



8. Switch to Design view.



Notice that the Show check box is selected by default for each of the fields used in the query. If you want to use a field in a query—for example, to sort on, to set criteria for, or in a calculation—but don't want to see the field in the results datasheet, you can clear its Show check box.

9. Clear the **Show** check box for **OrderID**, **CustomerID**, and **EmployeeID**, and then switch back to Datasheet view.

The three fields have been removed from the results datasheet.

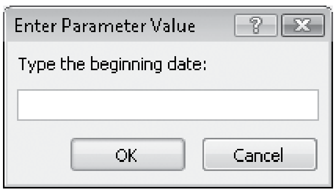
10. Switch to Design view.

    This query returns all records in the Orders table. To have the query match the records for a range of dates, you will convert it to a parameter query, which requests the date range each time you run it.

11. In the **OrderDate** column, type the following text in the **Criteria** cell, exactly as shown:

    Between [Type the beginning date:] And [Type the ending date:]

12. On the **Design** contextual tab, in the **Results** group, click the **Run** button to run the query.



13. Enter a beginning date of 1/1/07, and then press Enter.
14. Enter an ending date of 1/31/07, and then press Enter.

    Access redisplays the datasheet, this time listing only orders between the specified dates.

CLOSE the datasheet, saving the changes to the query, and then close the *QueryWizard* database.

Performing Calculations by Using a Query

You typically use a query to locate all the records that meet some criteria. But sometimes you are not as interested in the details of all the records as you are in summarizing them in some way. For example, you might want to know how many orders have been placed this year or the total dollar value of all orders placed. The easiest way to get this information is by creating a query that groups the necessary fields and does the math for you. To do this, you use ***aggregate functions*** in the query.

Access queries support the aggregate functions shown in the following table:

Function	Calculates
Sum	Total of the values in a field
Avg	Average of the values in a field
Count	Number of values in a field, not counting Null (blank) values
Min	Lowest value in a field
Max	Highest value in a field
StDev	Standard deviation of the values in a field
Var	Variance of the values in a field

In this exercise, you will create a query that calculates the total number of products in an inventory, the average price of all the products, and the total value of the inventory.

USE the *Calculate* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessLocating* folder.

OPEN the *Calculate* database.

1. On the **Create** tab, in the **Other** group, click the **Query Design** button.

   Access opens the query window and the Show Table dialog box.

2. In the **Show Table** dialog box, double-click **Products**, and then click **Close**.

   Access adds the Products table to the query window and closes the Show Table dialog box.

3. In the **Products Items** field list, double-click **ProductID** and then **UnitPrice**.

   Access copies both fields to the design grid.

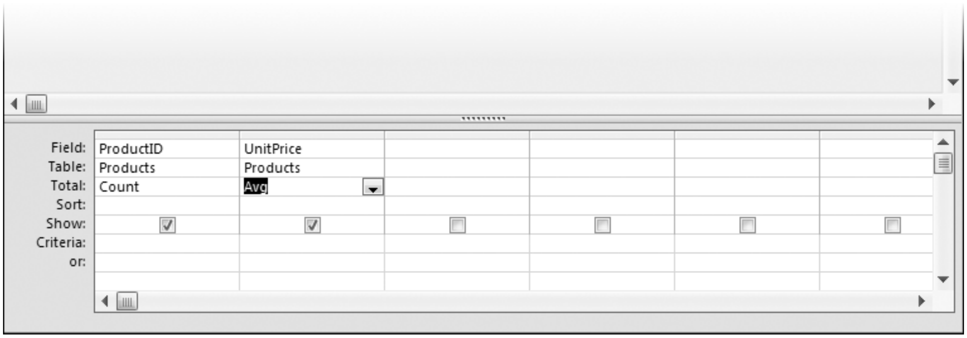
4. On the **Design** contextual tab, in the **Show/Hide** group, click the **Totals** button.

   Access adds a row named *Total* to the design grid.

5. In the **ProductID** column, click the **Total** arrow, and then in the list, click **Count**.

   Access enters the word *Count* in the Total cell. When you run the query, this function will return a count of the number of records containing a value in the ProductID field.

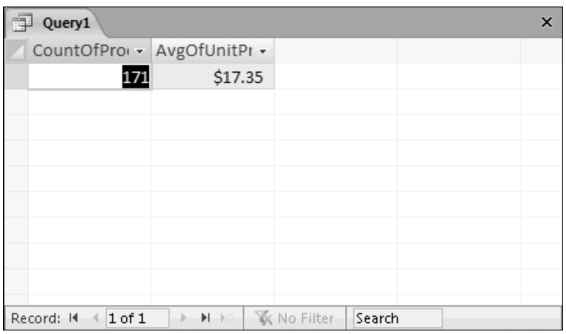
6. In the **UnitPrice** column, click the **Total** arrow, and then in the list, click **Avg**.



When you run the query, this function will return the average of all the UnitPrice values.

7. In the **Results** group, click the **Run** button.

   The query returns one record containing the count and the average price.



8. Switch back to Design view.
9. In the third column, in the **Field** cell, type **UnitPrice*UnitsInStock**, and press Enter.

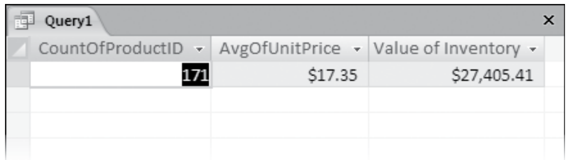
   Access changes the expression you typed to

   Expr1: [UnitPrice][UnitsInStock]*

   This expression will multiply the price of each product by the number of units in stock.
10. Select **Expr1** and type **Value of Inventory** to re-label the expression.
11. In the third column, click the **Total** arrow, and then in the list, click **Sum**.

    Access will return the sum of all the values calculated by the expression.

12. On the **Design** tab, in the **Results** group, click the **Run** button.

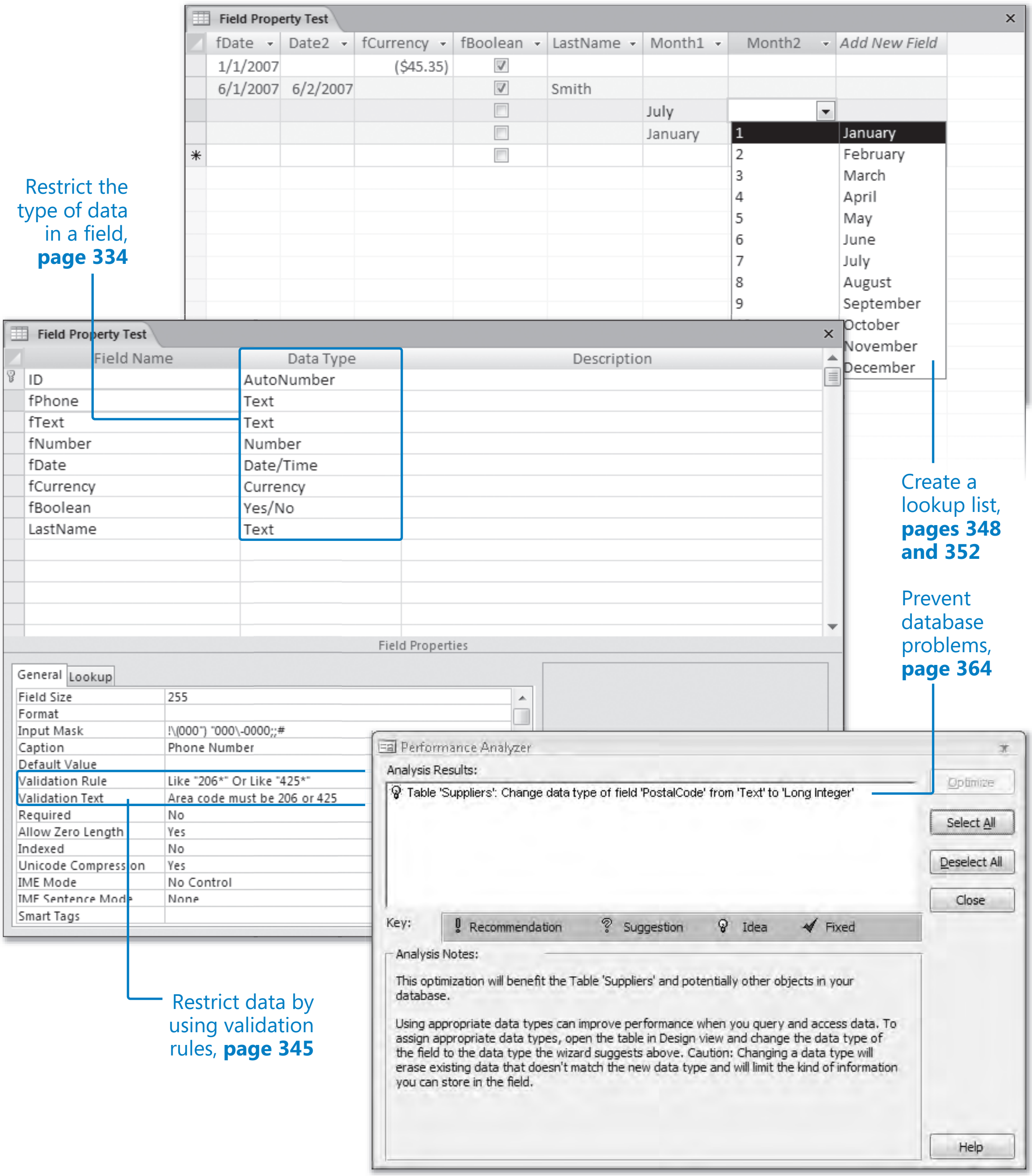


CLOSE the query window without saving your changes, and then close the *Calculate* database. If you are not continuing directly on to the next chapter, exit Access.

Key Points

- Microsoft Office Access 2007 provides a variety of tools you can use to organize the display of information in a database and to locate specific items of information. These tools make it easy to search through and find information in your database, even as it grows in size and complexity.
- You can sort a table in either ascending or descending order, based on the values in any field (or combination of fields). In Access, numbers can be treated as text or numerals.
- You can filter a table so that information containing some combination of characters is displayed (or excluded from the display). You can apply simple filters while viewing information in a table or a form. These filters are applied to the contents of a selected field, but you can apply another filter to the results of the first one to further refine your search.
- The Filter By Form command filters a table or form based on the information in several fields.
- The Advanced Filter/Sort command searches a table for records that meet multiple criteria or that require complex expressions as criteria.
- You can create queries to display specific fields from specific records from one or more tables, even designing the query to perform calculations for you. You can then save your queries for later use.

Chapter at a Glance



Restrict the type of data in a field, **page 334**

Create a lookup list, **pages 348 and 352**

Prevent database problems, **page 364**

Restrict data by using validation rules, **page 345**

12 Keeping Your Information Accurate

In this chapter, you will learn to:

- ✔ Restrict the type and amount of data in a field.
- ✔ Specify the format of data in a field.
- ✔ Restrict data by using validation rules.
- ✔ Create a simple or multi-column lookup list.
- ✔ Update information in a table.
- ✔ Delete information from a table.
- ✔ Prevent database problems.

Depending on how much information you have and how organized you are, you might compare a database to an old shoebox or to a file cabinet, into which you toss items such as photographs, bills, receipts, and a variety of other paperwork for later retrieval. However, neither a shoebox nor a file cabinet restricts anything other than the physical size of what you can place in it or imposes any order on its content. It is up to you to decide what you store there and to organize it properly so that you can find it when you next need it.

When you create a database by using Microsoft Office Access 2007, you can set properties that restrict what can be entered and impose order on the database contents, thereby helping you to keep the database organized and useful. You would not, for example, want employees to enter text into a price field, or to enter a long text description in a field when a simple "yes" or "no" answer would work best.

To ensure the ongoing accuracy of a database, you can create and run action queries that quickly update information or delete selected records from a table. You could, for example, increase the price of all products in one category by a certain percentage, or

remove all the elements of a specific product line. This type of updating is easy to do with an action query. Not only does using a query save time, but it helps to avoid errors.

In this chapter, you will restrict the type, amount, and format of data allowed in a field, and create a list from which a database user can choose a specific option. Then you will create and run an update query and a delete query.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Restricting the Type of Data in a Field

The Data Type setting restricts entries in a field to a specific type of data, such as text, numbers, or dates. If, for example, the data type is set to Number and you attempt to enter text, Access refuses the entry and displays a warning.

The ***field properties*** you can set to control input are:

- Required
- Allow Zero Length
- Field Size
- Input Mask
- Validation Rule

The Required and Allow Zero Length properties are fairly obvious. If the Required property is set to *Yes*, the field can't be left blank. However, Access differentiates between a blank field (which it refers to as a Null field) and a field that looks blank, but contains an empty string. If Allow Zero Length is set to *Yes*, you can enter an ***empty string*** (two quotation marks with nothing in between), which looks like a blank field, but it is classified as empty rather than Null. This differentiation might seem silly, but if you are using programming

code to work with an Access database, you will find that some commands produce different results for Null fields than they do for empty fields.

The Field Size, Input Mask, and Validation Rule properties are more complex, so the exercises in this chapter will focus on them.

> **Tip** Each field property has many options. For more information, search for *field property* in Access Help.

In this exercise, you will add fields of the most common data types to a table and then use the Data Type setting and Field Size property to restrict the data that can be entered into the table.

> **USE** the *FieldTest* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessKeeping* folder.
>
> **BE SURE TO** start Access before beginning this exercise.
>
> **OPEN** the *FieldTest* database. Then display the Field Property Test table in Design view.

1. Click in the first available **Field Name** cell (below the automatically generated **ID** field), type fText, and then press the Tab key to move to the **Data Type** cell.

   The data type defaults to Text.

2. In the second **Field Name** cell, type fNumber, and then press Tab.
3. Click the **Data Type** arrow, and in the list, click **Number**.

   > **Tip** You can scroll the list to the data type you want by typing the first letter of its name in the cell.

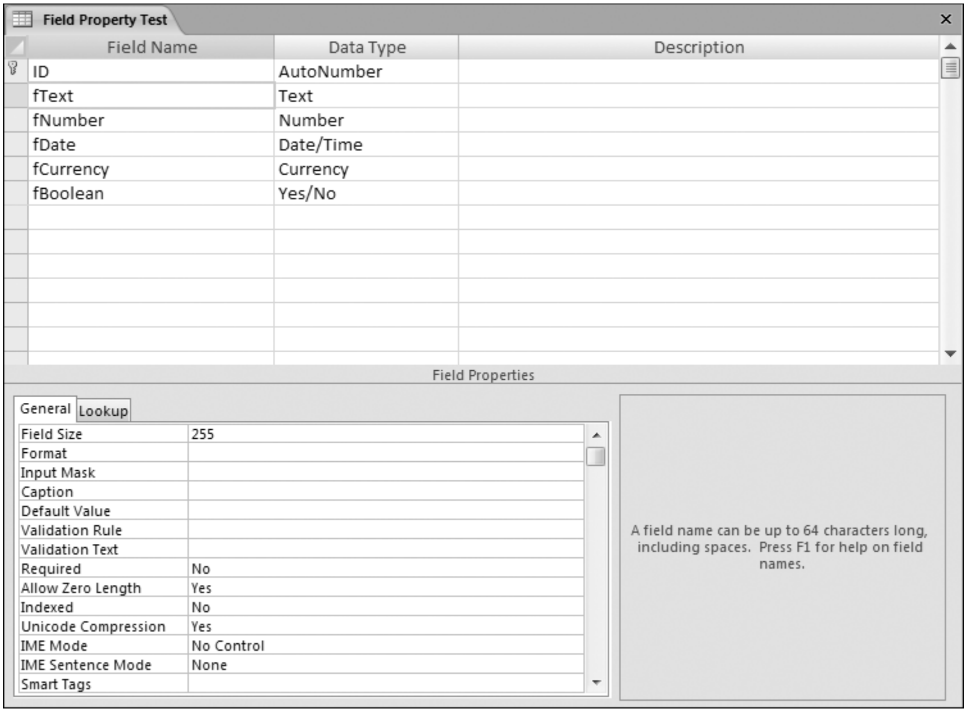
4. Repeat steps 2 and 3 to add the following fields:

Field	Data type
fDate	Date/Time
fCurrency	Currency
fBoolean	Yes/No

> **Tip** The data type referred to as *Yes/No* in Access is more commonly called *Boolean* (in honor of George Boole, an early mathematician and logistician). This data type can hold either of two mutually exclusive values, often expressed as *yes/no*, *1/0*, *on/off*, or *true/false*.

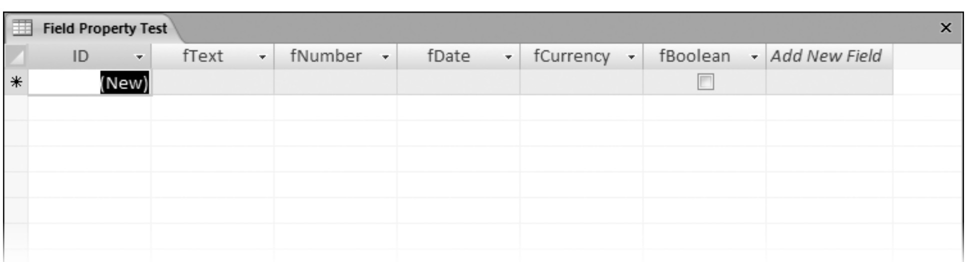
5. Click the **fText** field name to select it.

   Access displays the properties of the selected field in the lower portion of the dialog box.



6. Repeat step 5 to review the properties of each field, and then on the **Quick Access Toolbar**, click the **Save** button.

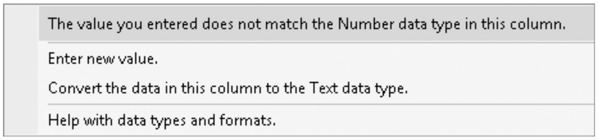
7. On the **View** toolbar, click the **Datasheet View** button.



8. In the **fText** cell, type This entry is 32 characters long.

9. In the **fNumber** cell, type Five hundred.

The data type for this field is Number. Access does not accept your text entry and displays a warning offering you several options.



10. In the **Microsoft Office Access** message box, click **Enter new value**. Then replace *Five Hundred* with 500.
11. In the **fDate** cell, type date, and then press Tab.

    Access does not accept the unexpected data format.
12. In the **Microsoft Office Access** message box that appears, click **Enter new value**, type Jan 1, and then press Tab.

    The fDate field accepts almost any entry that can be recognized as a date and displays it in the default date format. Depending on the default format on your computer, Jan 1 might be displayed as *1/1/2008, 1/1/08,* or in some other format.

> **Tip** If you enter a month and day but no year in a date field, Access assumes the date is in the current year. If you enter a month, day, and two-digit year from 00 through 30, Access assumes the year is 2000 through 2030. If you enter a two-digit year that is greater than 30, Access assumes you mean 1931 through 1999.

13. In the **fCurrency** field, type the word currency, and then press Tab.

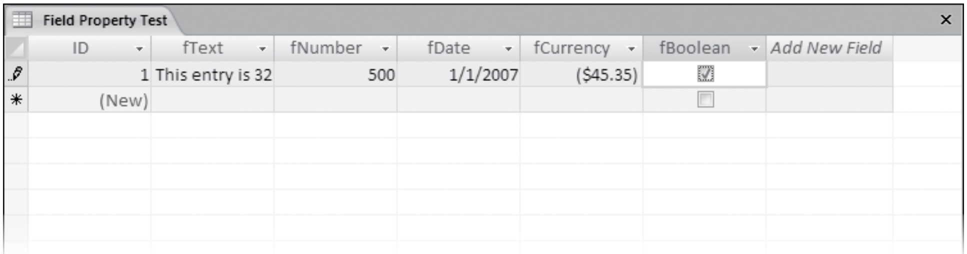
    Access does not accept the unexpected data format.
14. In the **Microsoft Office Access** message box that appears, click **Enter new value**, type –45.3456, and then press Tab.

    Access stores the number you entered but displays *($45.35),* the default format for negative currency numbers.

> **Tip** Access uses the regional settings in the Windows Control Panel to determine the display format for date, time, currency, and other numbers. You can create custom formats to ensure that the correct currency symbol is always displayed with your values. Otherwise, the numbers won't change, but the currency symbol might—for instance, from dollars to pounds, pesos, or euros.

15. In the **fBoolean** field, enter 123. Then click anywhere in the field to toggle the check box between **No** (not checked) and **Yes** (checked), finishing with the field in the checked state.

This field won't accept anything you type; you can switch only between two predefined values.



Tip In Design view, you can open the Properties dialog box, and on the Lookup tab, set the Boolean field to display as a check box, text box, or combo box. You can set the Format property on the General tab to use True/False, Yes/No, or On/Off as the displayed values in this field (though the stored values will always be -1 and 0).

CLOSE the table without saving your changes, and then close the *FieldTest* database.

Restricting the Amount of Data in a Field

The Field Size property, which is valid for the Text, Number, and AutoNumber data types, restricts the number of characters that can be entered in a text field (from 0 to 255) and the number of digits that can be entered in a number or AutoNumber field. You can set number fields to any of the following values:

Setting	Description
Byte	Stores whole numbers from 0 to 255
Integer	Stores whole numbers from –32,768 to 32,767
Long Integer	(The default.) Stores whole numbers from –2,147,483,648 to 2,147,483,647
Single	Stores negative numbers from –3.402823E38 to –1.401298E–45 and positive numbers from 1.401298E–45 to 3.402823E38
Double	Stores negative numbers from –1.79769313486231E308 to –4.94065645841247E–324 and positive numbers from 1.79769313486231E308 to 4.94065645841247E–324
Decimal	Stores numbers from -10^28 -1 through 10^28 -1

AutoNumber fields are automatically set to Long Integer.

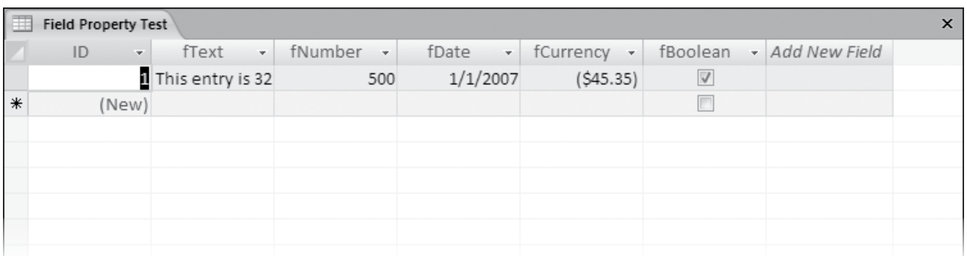
By setting the Field Size property to a value that allows the largest valid entry, you prevent the user from entering certain types of invalid information. If you try to type more characters in a text field than the number allowed by the Field Size setting, an audio alert sounds, and Access refuses to accept the entry. Likewise, Access rejects any value that is below or above the limits of a number field when you try to move out of the field.

In this exercise, you will change the Field Size property for several fields to see the impact this has on data already in the table and on new data that you enter.

USE the *Size* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessKeeping* folder.

OPEN the *Size* database. Then open the Field Property Test table in Datasheet view.

1. Review the contents of the one record.

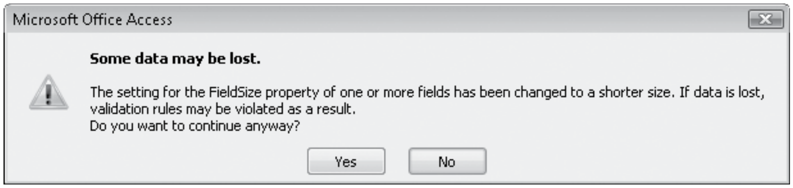


Design View

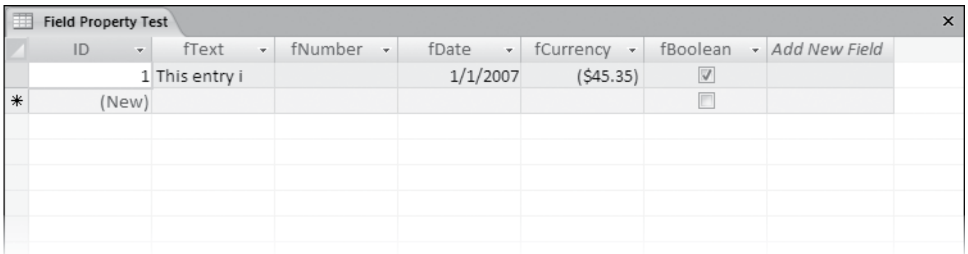
2. On the **View** toolbar, click the **Design View** button.
3. Click any cell in the **fText** row, and then in the **Field Properties** area, change the **Field Size** property from *255* to 12.
4. Click any cell in the **fNumber** row, click the **Field Size** arrow, and then in the list, click **Byte**.

   Access restricts the number of characters that can be entered in the text field to 12, and the values that can be entered in the number field to the range from 0 to 255 (inclusive).
5. Switch to Datasheet view, clicking **Yes** when prompted to save the table.

   The table contains data that doesn't fit these new property settings, so Access displays a warning that some data might be lost.



6. Click **Yes** to acknowledge the risk, and click **Yes** again to accept the deletion of the contents of one field.



The fText field now contains only 12 characters, rather than the 32 you entered. The other 20 characters have been permanently deleted. The fNumber field is empty because it is now limited to whole numbers from 0 through 255, and the value of 500 that you entered was deleted.

7. In the **fNumber** field, type 2.5, and then press the Enter key.

Access rounds the entered value to the nearest whole number.

CLOSE the Field Property Test table and the *Size* database.

Specifying the Format of Data in a Field

When you use ***masks*** in tables or forms, people entering information can see at a glance the format in which they should make entries and how long they should be. You can use the InputMask property to control how data is entered in text, number, date/time, and currency fields. This property has three sections, separated by semicolons, like the mask for a telephone number, shown here:

!\(000") "000\-0000;1;#

The first section contains characters that are used as placeholders for the information to be typed, as well as characters such as parentheses and hyphens. Together, all these characters control the appearance of the entry. The following table explains the purpose of the most common input mask characters:

Character	Description
0	Required digit (0 through 9).
9	Optional digit or space.
#	Optional digit or space; blank positions are converted to spaces; plus and minus signs are allowed.
L	Required letter (A through Z).
?	Optional letter (A through Z).
A	Required letter or digit.
a	Optional letter or digit.
&	Required character (any kind) or a space.
C	Optional character (any kind) or a space.
<	All characters that follow are converted to lowercase.
>	All characters that follow are converted to uppercase.
!	Characters typed into the mask fill it from left to right. You can include the exclamation point anywhere in the input mask.
\	Character that follows is displayed as a literal character.
"any text"	Access treats the string enclosed in double quotation marks as a literal string.
Password	Creates a password entry box. Any character typed in the box is stored as the character but displayed as an asterisk (*).

Any characters not included in this list are displayed as literal characters. If you want to use one of the special characters in this list as a literal character, precede it with the \ (backslash) character.

The second and third sections of the input mask are optional. Including a 1 in the second section or leaving it blank tells Access to store only the characters entered; including a 0 tells it to store both the characters entered and the mask characters. Entering a character in the third section causes Access to display that character as a placeholder for each of the characters to be typed; leaving it blank displays an underscore as the placeholder.

The input mask *!\(000") "000\-0000;1;#* creates this display in a field in either a table or a form:

(###) ###-####

In this example, you are restricting the entry to ten digits—no more and no less. The database user does not enter the parentheses, space, or dash, nor does Access store those characters (although you could display them in your table, form, or report if you set the correct format property). Access stores only the ten digits.

In this exercise, you will use the Input Mask wizard to apply a predefined telephone number input mask to a text field, forcing entered numbers into the *(XXX) XXX-XXXX* format. You will then create a custom mask to force the first letter entered in another text field to be uppercase (a capital letter).

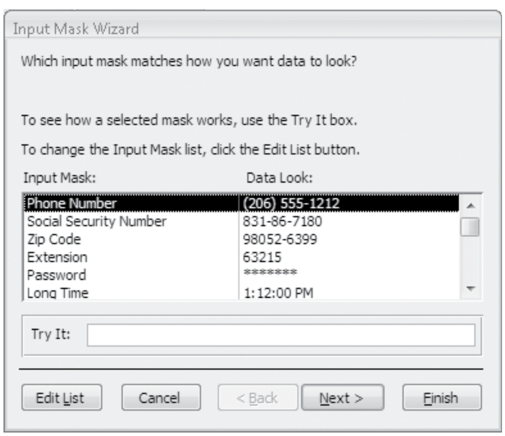
USE the *Accurate* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessKeeping* folder.

OPEN the *Accurate* database. Then display the Field Property Test table in Design view.

1. In the first blank **Field Name** cell, type **fPhone**, and leave the data type set to *Text*.
2. Click the row selector to select the row, and then drag the selected field up to place it just below the **ID** field.
3. Save the table design, and with **fPhone** still selected, click **Input Mask** in the **Field Properties** area.

Build

4. Click the **Build** button to the right of the cell to start the **Input Mask** wizard and display the first page of the wizard. (If you are prompted to install this feature, click **Yes**.)



5. With **Phone Number** selected in the **Input Mask** list, click **Next**.

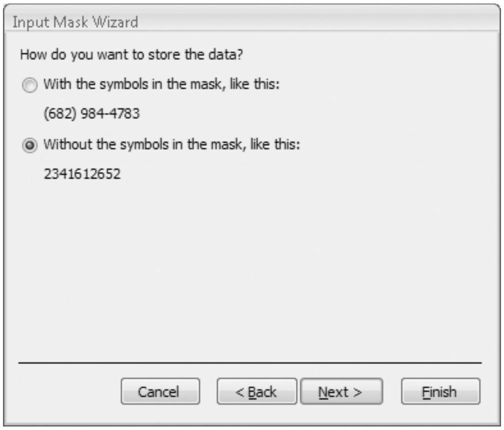
   The second page of the wizard displays the input mask and gives you the opportunity to change the placeholder character that will indicate what to type. The exclamation point causes Access to fill the mask from left to right with whatever is typed. The parentheses and hyphen are characters that Access will insert in the specified places. The nines represent optional digits, and the zeros represent required digits. This allows you to enter a telephone number either with or without an area code.

> **Tip** Because Access fills the mask from left to right, you would have to press the Right Arrow key to move the insertion point past the first three placeholders to enter a telephone number without an area code.

6. Change *999* to **000** to require an area code, and then change the placeholder character to **#**.

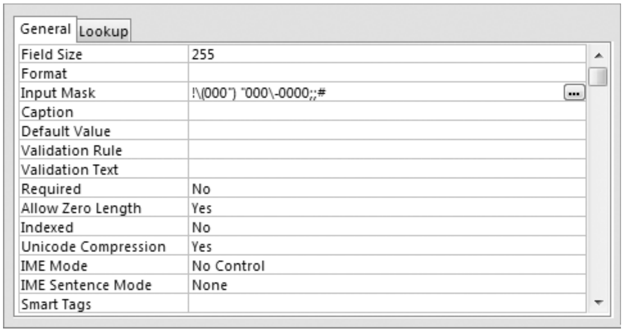
7. Click **Next**.

   On the third page of the wizard, you specify whether you want to store the symbols with the data. If you store the symbols, the data will always be displayed in tables, forms, and reports in this format. However, the symbols take up space, meaning that your database will be larger.



8. Accept the default selection—to store data without the symbols—by clicking **Finish**.

Access closes the wizard and displays the edited mask as the Input Mask property.



9. Press Enter to accept the mask.

   Access changes the format of the mask to *!\(000") "000\-0000;;#*. Notice the two semicolons that separate the mask into its three sections. Because you told Access to store data without the symbols, nothing is displayed in the second section of the mask. Notice also that Access added double quotation marks to ensure that the closing parenthesis and following space are treated as literals.

> **Tip** When you press Enter, a button appears in front of the Input Mask. This is the Property Update Options button, and if you click it, a list of options is displayed. In this case, the only options are to apply the input mask everywhere fPhone is used, and to provide help. This button disappears when you edit any other property or change to a different field.

10. Save your changes, and then switch to Datasheet view.
11. Press the ↓ key to move to the new record, then press the Tab key to move to the **fPhone** field. Type a series of numbers and letters to see how the mask works.

    Access formats the first ten numbers you enter as a telephone number, ignoring any letters or additional digits you type. If you type fewer than ten digits and then press Tab or Enter, Access warns that your entry doesn't match the input mask.

> **Tip** An input mask can contain more than only placeholders for the data to be entered. If, for example, you type "The number is" in front of the telephone number in the Input Mask property, the default entry for the field is *The number is (###) ###-####*. Then if you place the insertion point at the beginning of the field, the numbers you type replace the # placeholders, not the text. The Field Size setting is not applied to the characters in the mask, so if this setting is *15*, the entry is not truncated even though the number of displayed characters (including spaces) is 28.

12. Switch to Design view, and add a new field below **fBoolean**. Name it LastName. Leave the **Data Type** setting as the default, **Text**.

13. Select the new field, click **Input Mask**, type >L<?????????????????? (18 question marks), and press Enter.

    The greater than symbol (>) forces all following text to be uppercase. The *L* requires a letter. The less than symbol ()< forces all following text to be lowercase. Each question mark allows any letter or no letter, and there is one fewer question mark than the maximum number of letters you want to allow in the field (19, including the leading capital letter). The Field Size setting must be greater than this maximum.

14. Save your changes, return to Datasheet view, type smith in the **LastName** field of one of the records, and press Tab. Try entering SMITH, and then McDonald.

    Regardless of how you type the name, only its the first letter appears in the record capitalized. This type of mask has its limitations, but it can be useful in many situations.

CLOSE the Field Property Test table and the *Accurate* database.

Tip You can create an input mask manually for text, number, date, or currency fields, or you can apply one of several standard masks for text and date fields by using the Input Mask wizard.

Restricting Data by Using Validation Rules

A ***validation rule*** is an expression that can precisely define the information that will be accepted in one or several fields in a record. You might use a validation rule in a field containing the date an employee was hired to prevent a date in the future from being entered. Or if you make deliveries to only certain local areas, you could use a validation rule on the phone field or ZIP code field to refuse entries from other areas.

You can type validation rules in by hand, or you can use the ***Expression Builder*** to create them. At the field level, Access uses the rule to test an entry when you attempt to leave the field. At the table level, Access uses the rule to test the content of several fields when you attempt to leave the record. If an entry doesn't satisfy the rule, Access rejects the entry and displays a message explaining why.

In this exercise, you will create and test several field validation rules and one table validation rule.

USE the *Validate* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessKeeping* folder.

OPEN the *Validate* database. Then display the Field Property Test table in Design view.

1. Select **fPhone**, and then click in the **Validation Rule** box.

   A Build button appears at the end of the Validation Rule box. You can click this button to use the Expression Builder to create an expression, or you can type an expression in the box.

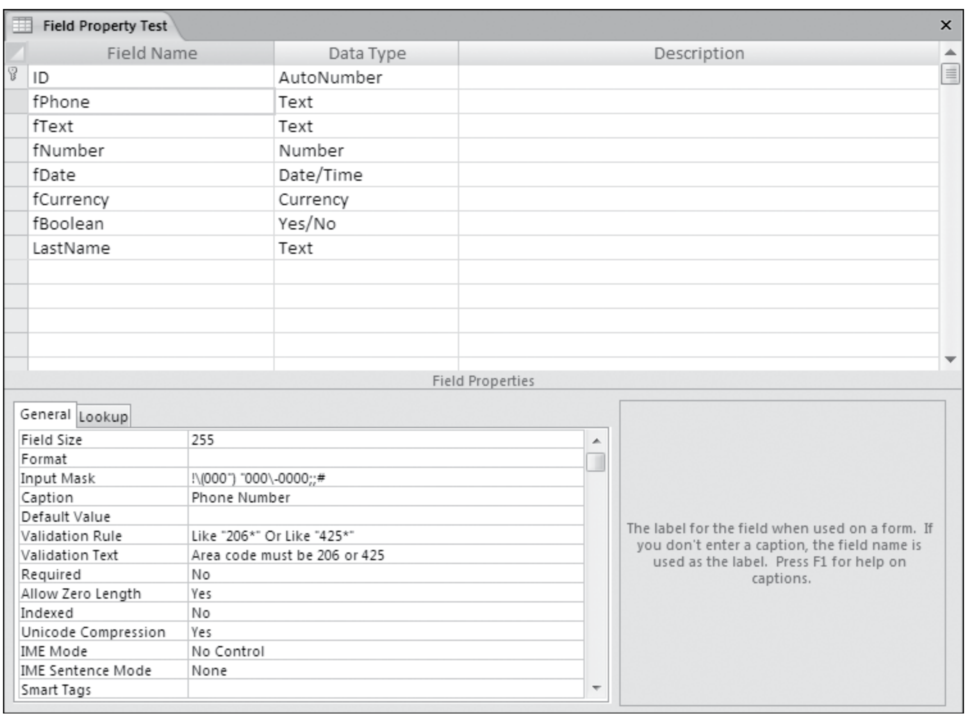
2. Type **Like "206*" Or Like "425*"** in the **Validation Rule** box, and press Enter.

   Troubleshooting Be sure to include the asterisk after the 206 and 425.

3. In the **Validation Text** box, type **Area code must be 206 or 425**.

   A rule is set for the first three digits typed in the fPhone field including the text that Access should display if someone attempts to enter an invalid phone number.

4. In the **Caption** box, type **Phone Number**.



5. Save the table.

   Access warns that data integrity rules have changed. The table violates the new rule because it contains blank phone number fields.

6. Click **No** to close the message box without testing the data.

> **Tip** When displaying tables as overlapping windows (rather than tabbed documents), you can test the validation rules in a table at any time by right-clicking the title bar of the table in Design view and then clicking Test Validation Rules.

7. Return to Datasheet view, where the caption for the first field is now *Phone Number*.

8. Place the insertion point to the left of the first # of any **Phone Number** field, type **3605550109**, and then press Enter.

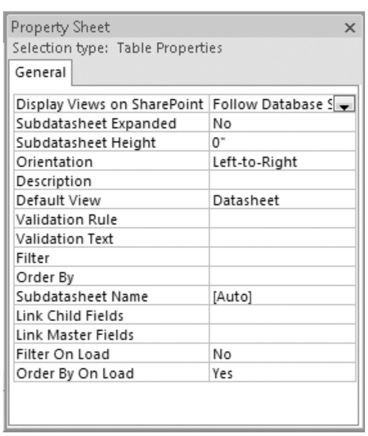
> **Tip** To select the entire field, move the pointer to the left end of the Phone Number field, and when the pointer changes to a thick cross, click the field. The insertion point is then at the start of the area code when you begin typing.

   The Validation Rule setting causes Access to display an alert box, warning you that the area code must be either 206 or 425.

9. Click **OK** to close the alert box, type a new phone number with one of the allowed area codes, and press Enter.

10. Return to Design view, and add another date field. Type **Date2** as the field name, set the data type to **Date/Time**, and drag the new field to just below **fDate**.

11. Right-click in the table window, and then click **Properties**.



> **Tip** The purpose of this Property Sheet is to set properties that apply to more than one field in the table, as opposed to setting properties for a single field in the Field Properties area.

12. Click in the **Validation Rule** box, type [Date2]>[fDate], and press Enter.
13. In the **Validation Text** box, type **Date2 must be later than fDate**, and then close the sheet.

    A table validation rule is added that ensures that the second date is always later than the first one.
14. Save the table (click **No** to close the data-integrity alert box), and return to Datasheet view.
15. In any record, type 6/1/07 in **fDate** and 5/1/07 in **Date2**, and then click another record.

    Access displays the Validation Text setting from the Table Properties dialog box, reminding you that Date2 must be later than fDate.
16. Click **OK**, change **Date2** to 6/2/2007, and then click in another record.

CLOSE the Field Property Test table and the *Validate* database.

Creating a Simple Lookup List

It is interesting how many different ways people can come up with to enter the same items of information in a database. Asked to enter the name of their home state, for example, residents of the state of Washington will type *Washington*, *Wash*, or *WA*, plus various typographical errors and misspellings. If you ask a dozen sales clerks to enter the name of a specific product, customer, and shipper in an invoice, it is unlikely that all of them will type the same thing. In cases like this, in which the number of correct choices is limited (to actual product name, actual customer, and actual shipper), providing the option to choose the correct answer from a list will improve your database's consistency.

Minor inconsistencies in the way data is entered might not be really important to someone who later reads the information and makes decisions. For example, *Arizona* and *AZ* refer to the same state. But a computer is very literal, and if you tell it to create a list so that you can send catalogs to everyone living in *AZ*, the computer won't include anyone whose state is listed in the database as *Arizona*.

You can limit the options for entering information in a database in several ways:

- For only two options, you can use a Boolean field represented by a check box. A check in the box indicates one choice, and no check indicates the other choice.
- For several mutually exclusive options on a form, you can use option buttons to gather the required information.
- For more than a few options, a ***combo box*** is a good way to go. When you click the arrow at the right end of a combo box, a list of choices is displayed. Depending on the properties associated with the combo box, if you don't see the option you want, you might be able to type something else, adding your entry to the list of possible options displayed in the future.
- For a short list of choices that won't change often, you can have the combo box look up the options in a list that you provide. Although you can create a lookup list by hand, it is a lot easier to use the ***Lookup wizard***.

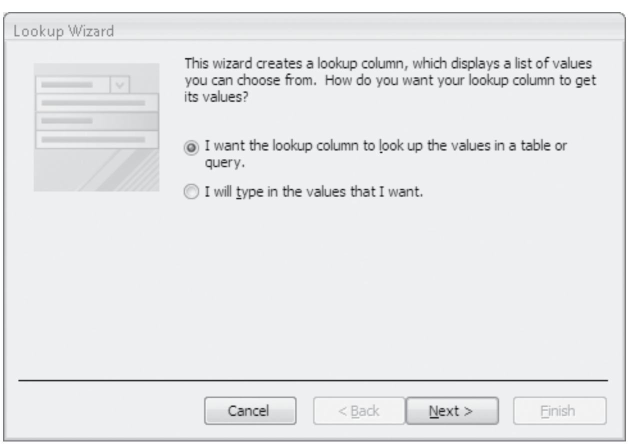
In this exercise, you will use the Lookup wizard to create a list of months from which the user can choose.

USE the *SimpleLookup* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessKeeping* folder.

OPEN the *SimpleLookup* database. Then display the Field Property Test table in Design view.

1. Add a new field below **LastName**. Name it Month1, and set the data type to **Lookup Wizard**.

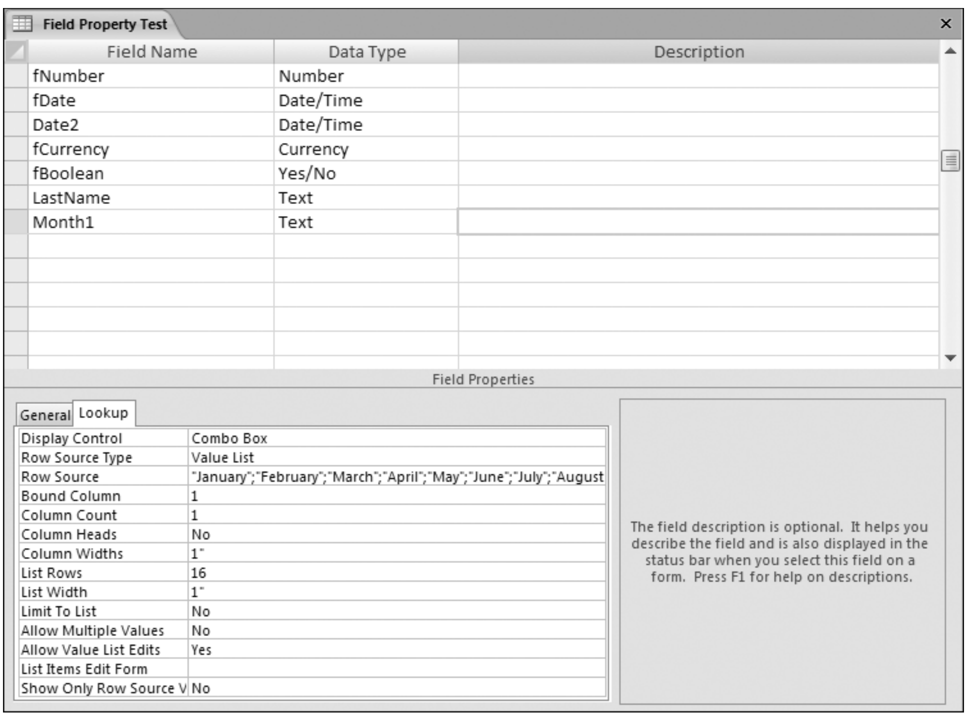
   The Lookup wizard starts.



You can use the Lookup wizard to create a combo box that provides the entry for a text field. The combo box list can come from a table or query, or you can type the list in the wizard.

> **Tip** If a field has a lot of potential entries, or if they will change often, you can link them to a table. (You might have to create a table expressly for this purpose.) If a field has only a few possible entries that won't change, typing the list in the wizard is easier.

2. Click **I will type in the values that I want**, and then click **Next**.
3. Leave the number of columns set to *1*, and click in the **Col1** box.
4. Enter the 12 months of the year (**January**, **February**, and so on), pressing Tab after each one to move to a new row.
5. Click **Next**, and then click **Finish**.
6. In the **Field Properties** area, click the **Lookup** tab to view the lookup information for the Month1 field.

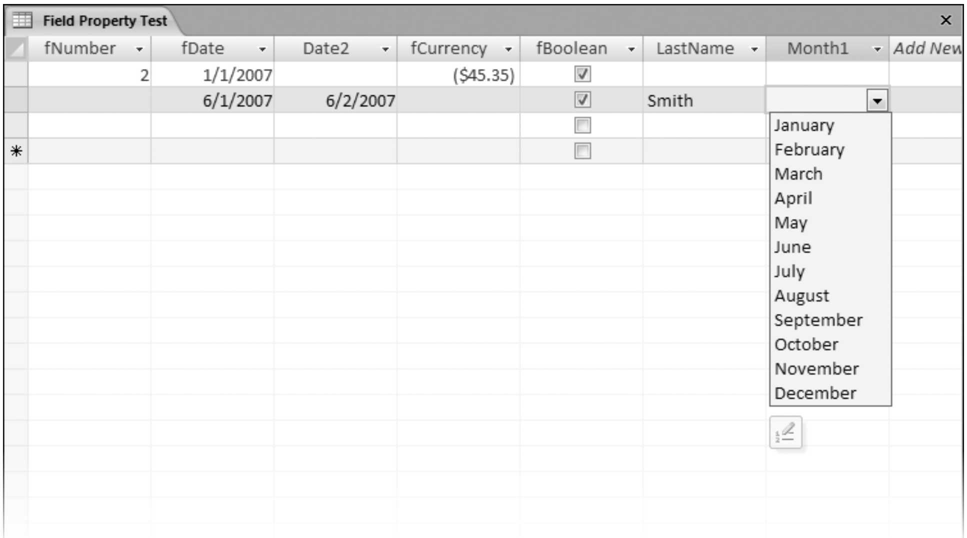


The wizard entered this information, but you can easily figure out what you would have to enter to create a lookup list by hand.

7. Switch to Datasheet view, clicking **Yes** to save your changes.
8. Double-click the vertical bars between the column headers to adjust the column widths so that you can see all the fields.

> **Tip** You can manually resize columns by dragging the vertical bars between the column headers.

9. Click in the **Month1** field of a record, and then click the arrow that appears to display the list of options.



Notice the button below the Month1 options list. Clicking this button opens the Edit List Items dialog box. This feature is new with Access 2007. The database user can open the editor by clicking the button, or by entering text that is not in the list and answering Yes when asked whether she or he wants to edit the list. If you don't want users to be able to edit the list, you can disable this property, as we do later in this exercise.

10. If you opened it, close the **Edit List Items** dialog box and then click **February** to enter it in the field.
11. Click in the next **Month1** field, type Jan, and press Enter.

    As soon as you type the *J*, the combo box displays *January*. If you had typed *Ju*, the combo box would have displayed *June*.

12. In the next **Month1** field, type jly, and press Enter.

    Even though the entry isn't in the list, it is accepted just as you typed it. Although there might be times when you want to allow the entry of information other than the items in the list, this isn't one of those times, so you need to change the field properties to limit what can be entered.

13. Return to Design view.

    The Limit To List property on the Lookup tab for Month1 is currently set to *No*, which allows people to enter information that isn't in the list.

14. Change **Limit To List** to **Yes**.
15. Change **Allow Value List Edits** to **No**.
16. Save the table, return to Datasheet view, type jly in a new **Month1** field, and then press Enter.

    Access informs you that the text you entered is not in the list, and refuses the entry.

17. In the **Microsoft Office Access** message box, click **OK**.
18. In the **Month1** list, click **July**.

    The month of July is displayed in the field.

CLOSE the *SimpleLookup* database, saving your changes.

Creating a Multi-Column Lookup List

Selecting a month from a list of names is convenient for people, but if your computer has to deal with this information in some mathematical way, a list of the numbers associated with each month is easier for it to use.

In this exercise, you will use the Lookup wizard to create a two-column list of months from which the user can choose.

USE the *MulticolumnLookup* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessKeeping* folder.

OPEN the *MulticolumnLookup* database. Then display the Field Property Test table in Design view.

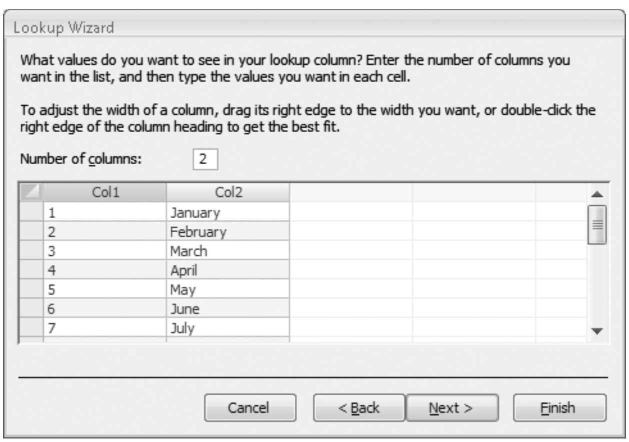
1. Add a new field below **Month1**. Name it Month2, and set the data type to **Lookup Wizard**.

2. Click **I will type in the values that I want**, and then click **Next**.
3. Type 2 to add a second column, and then click in the **Col1** cell.

   Access adds a second column, labeled *Col2*.
4. Enter the following numbers and months in the two columns:

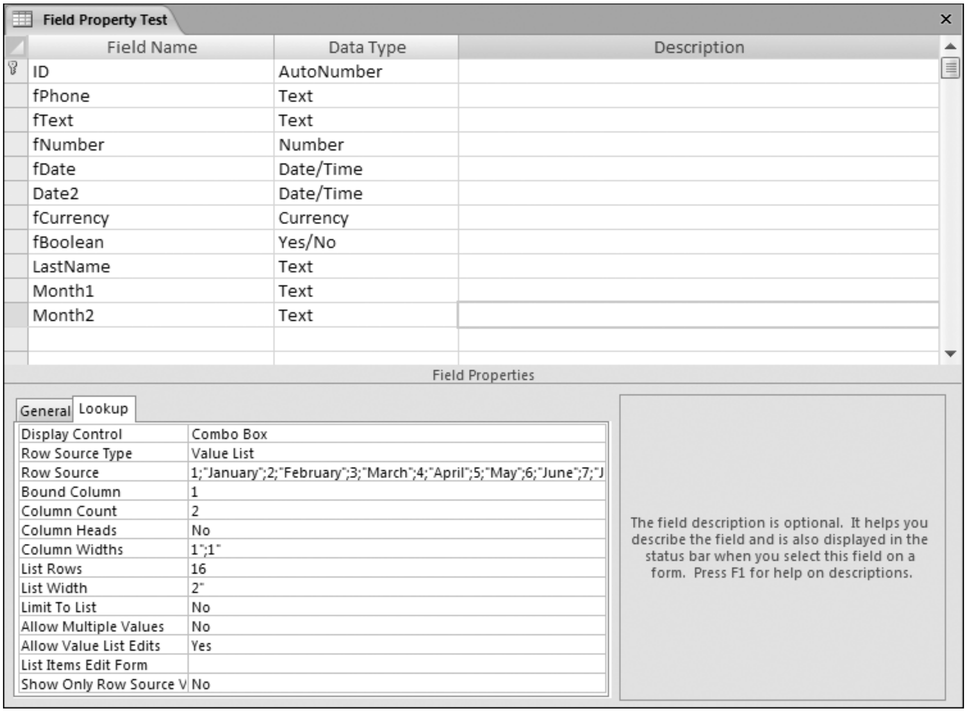
Number	Month
1	January
2	February
3	March
4	April
5	May
6	June
7	July
8	August
9	September
10	October
11	November
12	December

   It is not necessary to adjust the width of the columns in the Lookup wizard other than to make them visible within the wizard itself.



5. Click **Next**, and then click **Finish**.

6. In the **Field Properties** area, click the **Lookup** tab to view the lookup information for the **Month2** field.

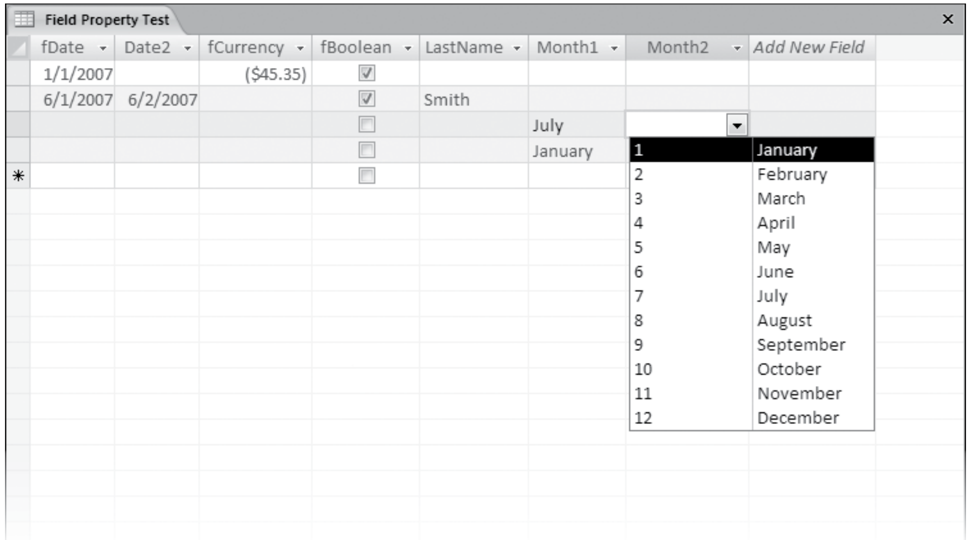


The wizard has inserted your column information into the Row Source box and set the other properties according to your specifications.

7. Change **Limit To List** to **Yes** and **Allow Value List Edits** to **No**.

> **Tip** When a property has two or more possible values, you can quickly cycle through them by double-clicking the value, rather than clicking the arrow to open the list.

8. Save your changes, switch to Datasheet view, and then click the arrow in a **Month2** field to display the list of options.



9. In the **Month2** list, click **January**.

   Access displays the number *1* in the field, which is useful for the computer. However, people might be confused by the two columns and by seeing something other than what they clicked or typed.

10. Switch back to Design view, and in the **Column Widths** box—which appears as *1";1"*—change the width for the first column to 0 (you don't have to type the symbol for inches) to prevent it from being displayed.

11. Save your changes, return to Datasheet view, and as a test, in the remaining records set **Month2** to **February** in two records and to **March** in one record.

    Only the name of the month is now displayed in the list, and when you click a month, that name is displayed in the field. However, Access actually stores the associated number from the list's first column.

12. Right-click any cell in the **Month2** column, point to **Text Filters**, and then click **Equals.**

13. In the **Custom Filter** box, type 2, and then press Enter.

    Access now displays only the two records with February in the Month2 field.

14. Click the **Toggle Filter** button, and then repeat steps 12 and 13, this time typing 3 in the box to display the one record with *March* in the **Month2** field.

CLOSE the *MulticolumnLookup* database, saving your changes.

Updating Information in a Table

As you use a database and as it grows, you might discover that errors creep in or that some information becomes out of date. You can tediously scroll through the records looking for those that need to be changed, but it is more efficient to use a few of the tools and techniques provided by Access for that purpose.

If you want to find or replace multiple instances of the same word or phrase, you can use the Find and Replace commands on the Edit menu. This command works much like the same commands in Microsoft Office Word or Microsoft Office Excel.

If you want to change information stored in the database only under certain circumstances, you need the power of an update query, which is a select query that performs an action on the query's results.

> **Tip** Running an update query makes irreversible changes to the table; therefore, you should always create a backup copy of the table before running a query.
>
> You can quickly create a copy of a table by displaying the Tables list in the Navigation Pane, clicking the table you want to copy, pressing Ctrl+C, and then pressing Ctrl+V to paste a copy. In the Paste Table As dialog box, type a name for the new table, and then click OK.

In this exercise, you will create an update query to increase the price of selected items by 10 percent.

> **USE** the *Update* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessKeeping* folder.
>
> **OPEN** the *Update* database.

1. On the **Create** tab, in the **Other** group, click the **Query Wizard** button.
2. In the **New Query** dialog box, with **Simple Query Wizard** selected, click **OK**.
3. In the **Tables/Queries** list, click **Table: Categories**.

4. In the **Available Fields** list, double-click **CategoryName** to move it to the **Selected Fields** list.
5. In the **Tables/Queries** list, click **Table: Products**.
6. In the **Available Fields** list, double-click **ProductName** and **UnitPrice** to move them to the **Selected Fields** list.
7. In the **Simple Query Wizard** dialog box, click **Finish** to create the query using the default detail setting and title.

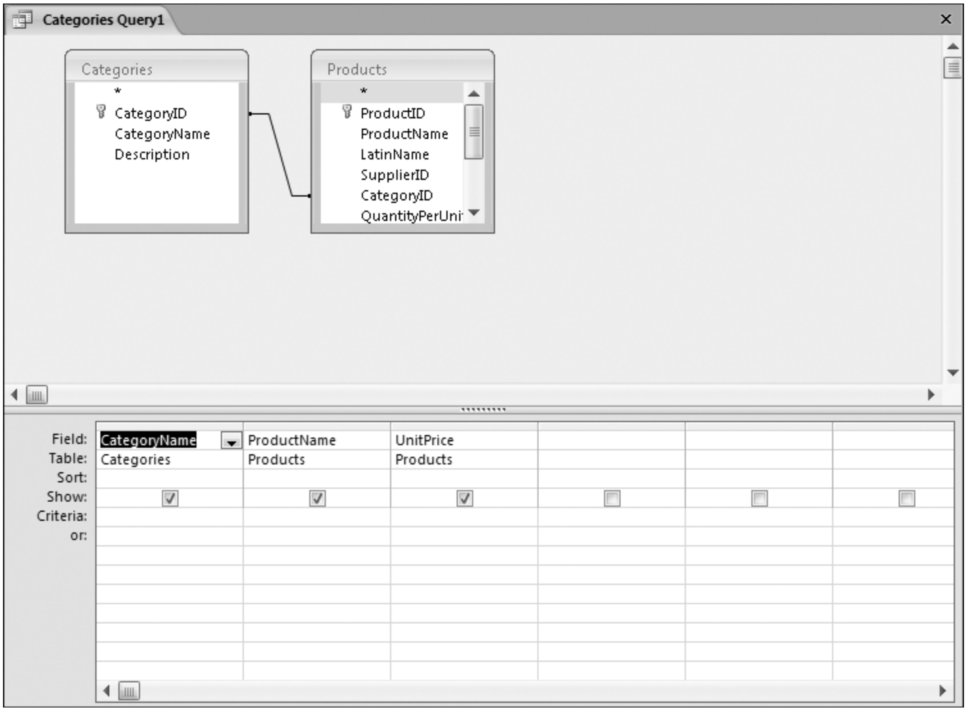
   Access displays the query results in a datasheet. Only the Category Name, Product Name, and Unit Price fields are displayed.


Categories Query1

Category Nam	Product Name	Unit Price
Bulbs	Magic Lily	$40.00
Bulbs	Autumn crocus	$18.75
Bulbs	Anemone	$28.00
Bulbs	Lily-of-the-Field	$38.00
Bulbs	Siberian Iris	$12.95
Bulbs	Daffodil	$12.95
Bulbs	Peony	$19.95
Bulbs	Lilies	$10.50
Bulbs	Begonias	$18.95
Bulbs	Bulb planter	$6.95
Cacti	Prickly Pear	$3.00
Ground covers	Crown Vetch	$12.95
Ground covers	English Ivy	$5.95
Ground covers	European Ginger	$6.25
Ground covers	St. John's Wort	$9.75
Ground covers	Fairies Fern	$9.95
Grasses	The Best Bluegrass	$17.95
Grasses	Decorator moss	$15.45
Grasses	Colonial Bentgrass	$15.50
Grasses	Creeping Bentgrass	$12.05
Grasses	Red Fescue	$20.00
Grasses	Perennial Ryegrass	$19.95
Grasses	Redtop	$21.50
Flowers	Lily-of-the-Valley	$33.00

Record: 1 of 189 No Filter Search

8. Display the query in Design view.



The current query results include the products in all categories. You want to raise the prices of only the products in the Bulbs and Cacti categories, so your next task is to change the query to select only those categories.

9. In the **Criteria** row, in the **CategoryName** column, type bulbs. Then in the **or** row, type cacti.

10. Click the **Run** button to run the query to confirm that only bulbs and cacti are listed, and then return to Design view.

The query now selects only the records you want to change. But to actually make a change to the records, you have to use an update query.

> **Tip** You can't create an action query directly; you must first create a select query and then change the query to one of the action types. With an existing select query open in Design view, you can find the command to convert it to an action query in the Query Type group and on the shortcut menu that appears when you right-click the query window and then point to Query Type.

11. Display the query in Design view. On the **Design** contextual tab, in the **Query Type** group, click the **Update** button.

Access converts the select query to an update query. In the design grid, the Sort and Show rows disappear and an Update To row appears.

12. In the **Update To** row, in the **UnitPrice** column, type [UnitPrice]*1.1.

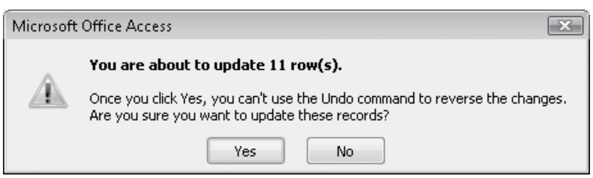
> **Tip** Enclosing UnitPrice in brackets indicates that it is an Access object. If you use the Expression Builder to insert this expression, it looks like this: *[Products]![UnitPrice]*1.1*. Because this description of the field includes the table in which it is found, you can also insert this expression in other tables.

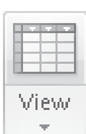
13. Display the query in Datasheet view.

In a select query, clicking the View button is the same as clicking the Run button. But in an update query, clicking the View button simply displays a list of the fields that will be updated. In this case, you see a list of unit prices that matches the ones shown earlier in the select query.

14. Switch to Design view. Then on the Query Tools **Design** contextual tab, in the **Results** group, click the **Run** button.

Access displays a warning that you can't undo the changes you are about to make, and asks you to confirm that you want to update the records.





15. In the **Microsoft Office Access** message box, click **Yes**. Then click the **View** button to display the **UnitPrice** field, where all the prices have been increased by 10 percent.

16. Save and close the query.

CLOSE the *Update* database.

Deleting Information from a Table

Over time, some of the information stored in a database might become obsolete. The Products table in our sample database, for example, lists all the products the company currently offers for sale or has sold in the past. You can indicate that a product is no longer available for sale by placing a check mark in the Discontinued field. Discontinued products aren't displayed in the catalog or offered for sale, but they are kept in the database for a while in case it becomes practical to sell them again. A similar situation could exist with customers who haven't placed an order in a long time or who have asked to be removed from a mailing list but might still place orders.

To maintain an efficient database, it is a good idea to clean house and discard outdated records from time to time. You could scroll through the tables and delete records manually, but if all the records you want to delete match some pattern, you can use a delete query to quickly get rid of all of them.

> **Important** Keep in mind several things when deleting records from a database. First, you can't recover deleted records. Second, the effects of a delete query can be more far-reaching than you intend. If the table from which you are deleting records is linked to another table, and the Cascade Delete Related Records option for that relationship is selected, records in the second table will also be deleted. Sometimes this is what you want, but sometimes it isn't. For example, you probably don't want to delete records of previous sales at the same time you delete discontinued products.
>
> To safeguard against these problems, it is a good idea to back up your database before deleting the records, or to create a new table (perhaps named *Deleted<file name>*), and then move the records you want to delete to the new table, where you can review them before deleting them permanently.

In this exercise, you will create a delete query to remove all discontinued products from a database table.

> **USE** the *Delete* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessKeeping* folder.
>
> **OPEN** the *Delete* database.

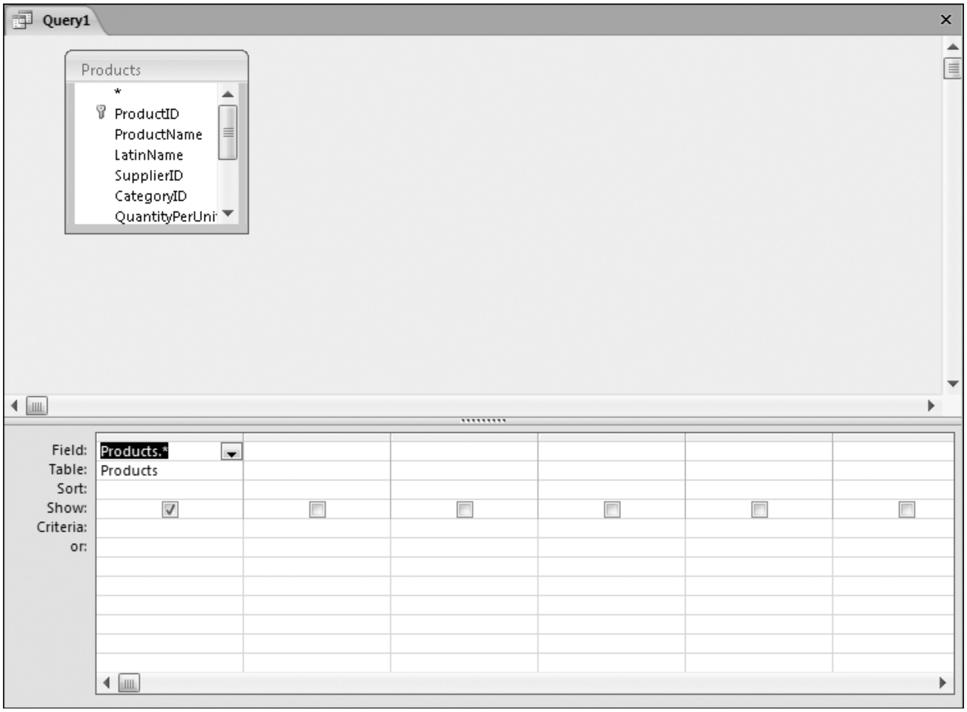
1. On the **Create** tab, in the **Other** group, click the **Query Design** button.

   Access opens a new query object and the Show Table dialog box.

2. In the **Show Table** dialog box, double-click **Products** to add that table to the query window list area, and then click **Close**.

3. In the **Products** field list, double-click the asterisk to copy all the fields in the table to the query.

   Products.* appears in the Field row of the first column of the design grid, and *Products* appears in the Table row.

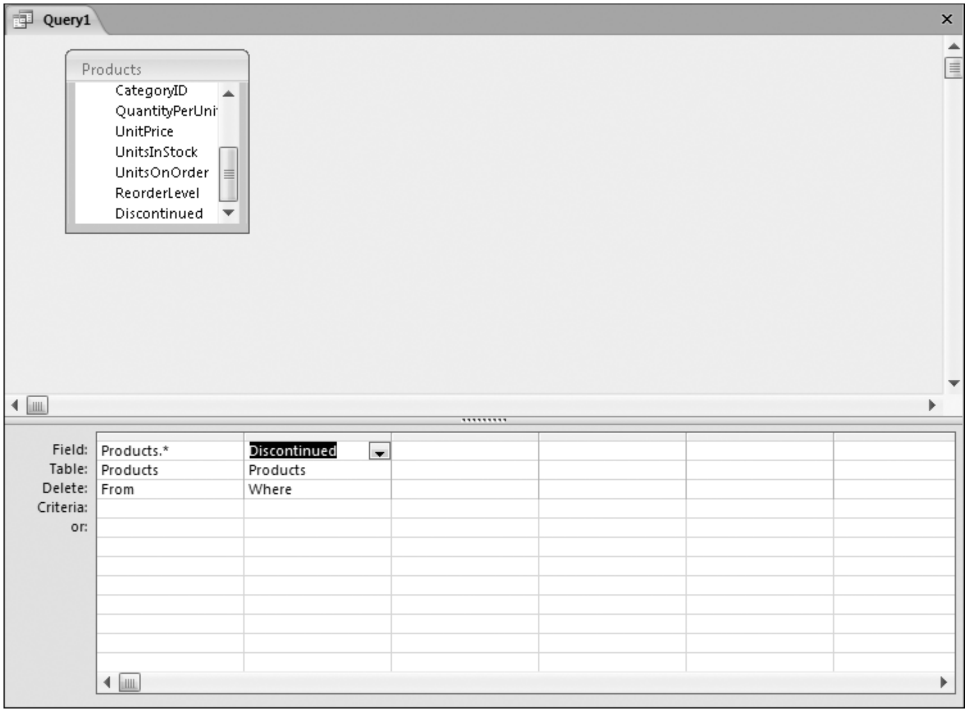


> **Important** Double-clicking the asterisk in the field list is a quick way to move all the fields in a table to the query without having each field appear in its own column. However, selecting multiple fields in this way prevents you from setting Sort, Show, and Criteria values for individual fields. To set these values, you have to add the specific fields to the design grid, thereby adding them twice. To avoid displaying the fields twice, clear the check mark in the Show row of the duplicate individual fields.

4. In the **Products** field list, double-click **Discontinued** to copy it to the next available column in the design grid.

5. In the **Query Type** group, click the **Delete** button to convert this select query to a delete query.

   A Delete row appears in the design grid, and the Sort and Show rows disappear.



   In the first column, which contains the reference to all fields in the Products table, the Delete row contains the word *From*, indicating that this is the table from which records will be deleted. When you add individual fields to the remaining columns, as you did with the Discontinued field, the Delete row displays *Where*, indicating that this field can include deletion criteria.

6. In the **Criteria** row, in the **Discontinued** column, type Yes.

   The Discontinued field is set to the Boolean data type, which is represented in the datasheet as a check box that is selected to indicate Yes and cleared to indicate No. To locate all discontinued products, you need to identify records with the Discontinued field set to Yes.

7. To check the accuracy of the query, switch to Database view.

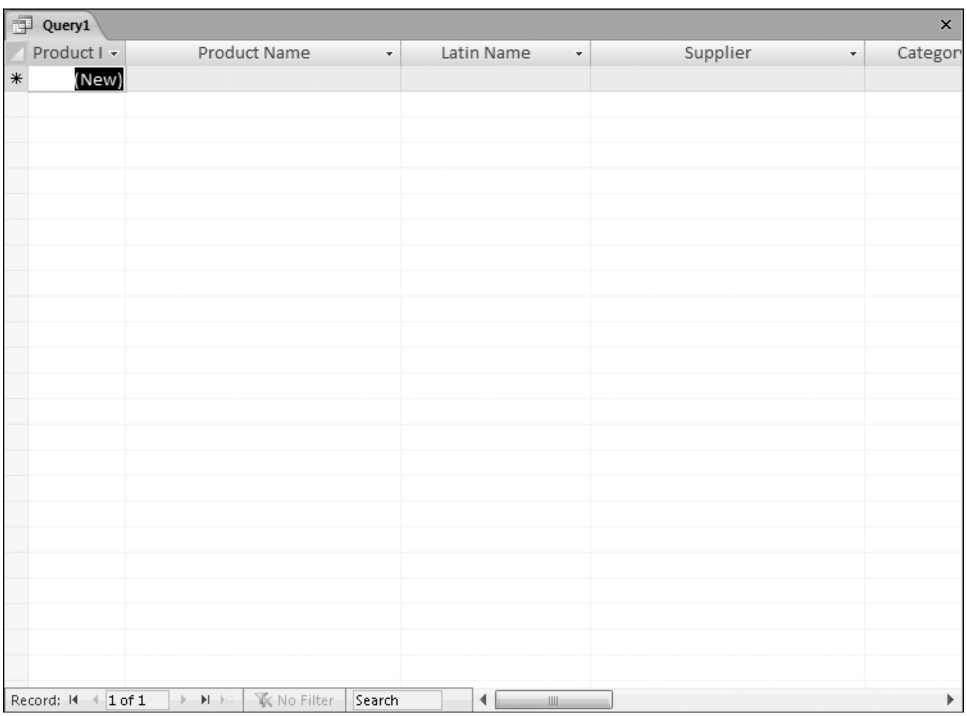
Testing the query results in a list of 18 discontinued products that would be deleted if you ran the query. Scroll to the right to verify that all records display a check mark in the Products.Discontinued field.

8. Switch to Design view. Then on the **Design** contextual tab, in the **Results** group, click the **Run** button to run the delete query.

   Access displays a warning to remind you of the permanence of this action.

> **Tip** Before actually deleting records, you might want to display the Relationships window by clicking the Relationships button in the Show/Hide Group on the Database Tools tab. If the table you are deleting data from has a relationship with any table containing information that shouldn't be deleted, right-click the relationship line, click Edit Relationship, and make sure that the Enforce Referential Integrity check box is selected and the Cascade Delete Related Records check box is *not* selected.

9. In the **Microsoft Office Access** message box, click **Yes** to delete the records.
10. Switch to Datasheet view and verify that all the records were deleted.



11. If you think you might run the same delete query in the future, save and name the query.

> **Tip** If you are concerned that someone might accidentally run a delete query and destroy records you weren't ready to destroy, change the query back to a select query before saving it. You can then open the select query in Design view and change it to a delete query the next time you want to run it.

CLOSE the query and the *Delete* database.

Preventing Database Problems

In the day-to-day use of an Access database—adding and deleting records, modifying forms and reports, and so on—various problems can develop. This is especially true if the database is stored on a network share, rather than on a local drive, and is accessed by multiple users. Access monitors the condition of database files as you open and work with them. If a problem develops, Access attempts to fix it. If Access can't fix the problem, it usually provides additional information that might help you to find a solution. But Access doesn't always spot problems before they affect the database; if this happens, you might notice that the database performance seems to slow down or become erratic. Even if no actual errors occur, normal database use causes the internal structure of a database to become fragmented, resulting in a bloated file and inefficient use of disk space.

You don't have to wait for Access to spot a problem. There are various things you can do to help keep your database healthy and running smoothly. Your first line of defense against damage or corruption in any kind of file is the maintenance of backups. Database files rapidly become too large to conveniently back up onto a floppy disk, but you have many other options: you can copy the file to another computer on the network or to removable media such as a USB flash drive, send it as an e-mail attachment to another location, create a tape backup, or burn a CD-ROM.

> **Tip** To back up a database in Access 2007, click the Microsoft Office Button, point to Manage, and then click Back Up Database.

You can use the following Access utilities to keep your database running smoothly:

- **Compact and Repair Database.** This utility first optimizes performance by rearranging how the file is stored on your hard disk, and then it attempts to repair corruption in tables, forms, reports, and modules.
- **Performance Analyzer.** This utility analyzes the objects in your database and offers three types of feedback: ideas, suggestions, and recommendations. You can instruct Access to optimize the file by following through on any of the suggestions or recommendations.
- **Database Documenter.** This tool produces a detailed report containing enough information to rebuild the database structure if that were ever necessary.
- **Analyze Table.** This wizard tests database tables for compliance with standard database design principles, suggests solutions to problems, and implements those solutions at your request.
- **Microsoft Office Diagnostics.** This command attempts to diagnose and repair problems with your Microsoft Office programs.

> **Important** Take care when running the Microsoft Office Diagnostics utility, because it might change files and registry settings that affect all Office programs.

In this exercise, you will back up a database and then run the Compact And Repair Database, Performance Analyzer, and Database Documenter utilities.

> **USE** the *Prevent* database. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\AccessKeeping* folder.
>
> **OPEN** the *Prevent* database. Do not display any of the database tables.

Microsoft Office Button

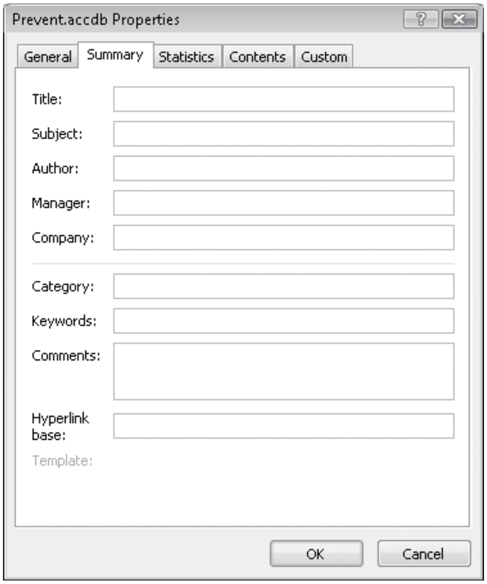
1. Click the **Microsoft Office Button**, point to **Manage**, and then click **Back Up Database**.
2. In the **Save As** dialog box, navigate to your *Documents\Microsoft Press\2007OfficeSBS\AccessKeeping* folder, and then click **Save**.

> **Tip** When you back up a database, Access appends the current date to the database file name in the following format: *Prevent_2007-04-22.accdb*. You can change the file name to suit your needs.

Access creates a compacted copy of the database in the specified folder.

3. Click the **Microsoft Office Button**, point to **Manage**, and then click **Database Properties**.

   The Database Properties dialog box opens, displaying information about your database on five tabs.



4. On the **General** tab, note the size of the database. Then click **OK** to close the dialog box.

5. Click the **Microsoft Office Button**, point to **Manage**, and then click **Compact and Repair Database**. Acknowledge the safety warning if prompted to do so.

   The utility takes only a few seconds to run, and you will see no difference in the appearance of the database.

> **Troubleshooting** If you don't have enough space on your hard disk to store a temporary copy of the database, you don't have appropriate permissions, or another user also has the database open, the Compact And Repair Database function will not run.

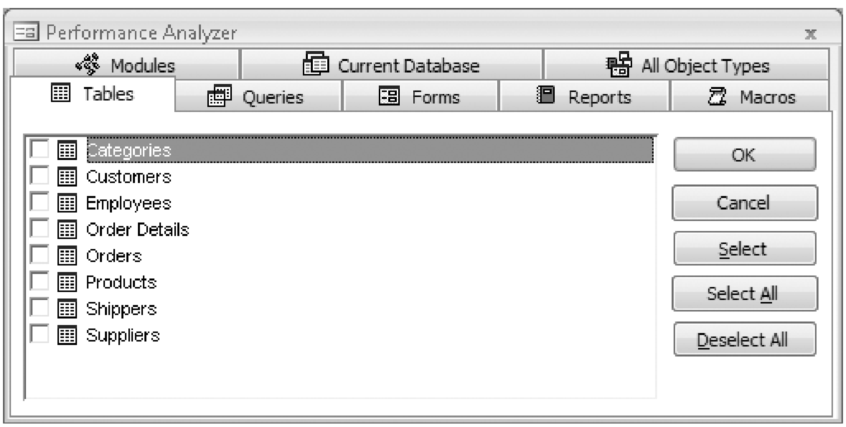
6. Repeat steps 3 and 4 to display the database size, and compare it to the original database size.

   You can expect a 10 to 25 percent reduction in the size of the database if you have been using it for a while.

> **Tip** It is a good idea to compact and repair a database often. You can have Access do this automatically each time the database is closed. To do so, click the Microsoft Office Button, click the Access Options button, and then on the Current Database page, select the Compact On Close check box, and click OK.

7. On the **Database Tools** tab, in the **Analyze** group, click the **Analyze Performance** button.

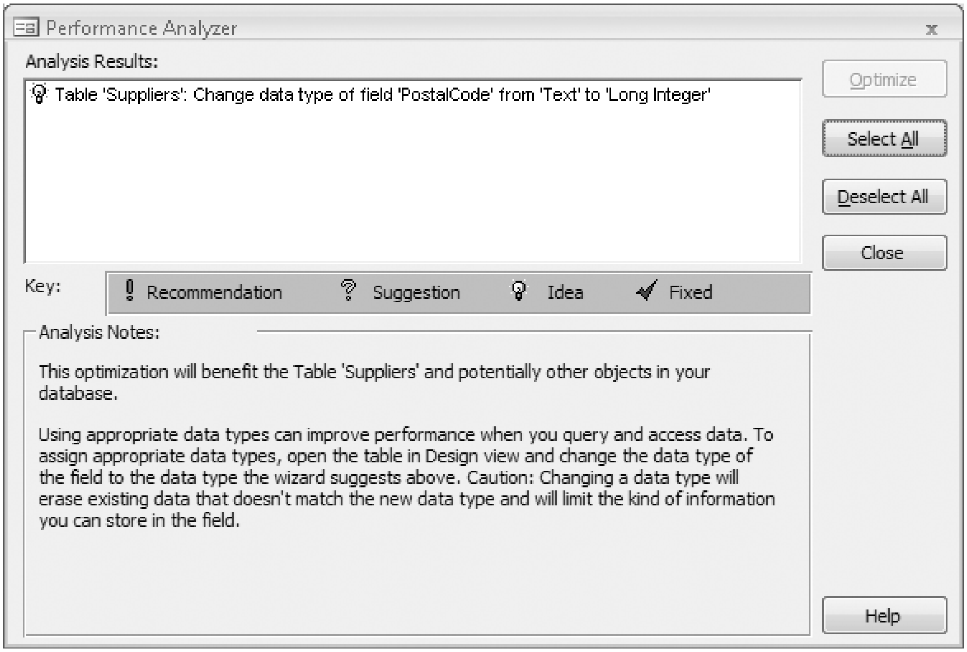
   The Performance Analyzer dialog box opens.



   This dialog box contains a tab for each type of object the utility can analyze, and a tab displaying all the existing database objects.

8. On the **All Object Types** tab, click **Select All**, and then click **OK** to start the analyzer.

When it finishes, the Performance Analyzer displays its results. (The results you see might be different from those shown here.)



The icons in the left column of the Analysis Results list indicate the category of each entry: *Recommendation*, *Suggestion*, and *Idea*. (After you perform any of the optimizations, *Fixed* entries will also appear in the list.) Clicking an entry displays information about it in the Analysis Notes section.

9. Scroll through the list, clicking each entry in turn, and read all the analysis notes.

   Most of the suggestions are valid, though some, such as the one to change the data type of the PostalCode field to Long Integer, are not appropriate for this database.

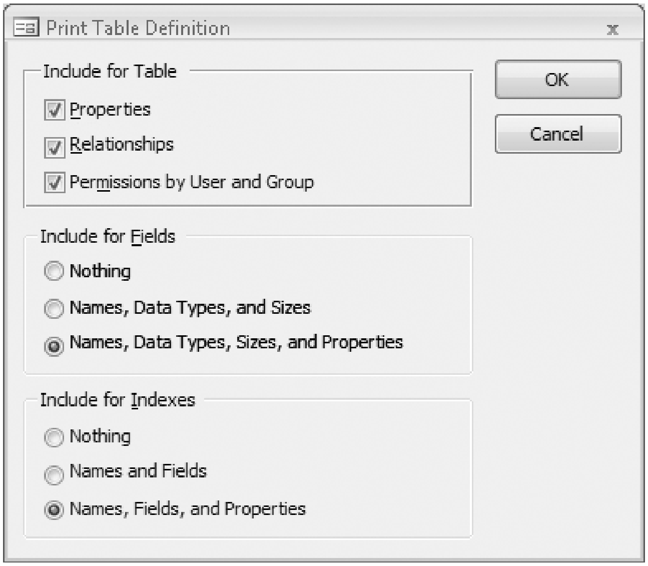
10. Close the **Performance Analyzer** dialog box.

11. On the **Database Tools** tab, in the **Analyze** group, click the **Database Documenter** button.

    The Documenter dialog box opens. This dialog box is identical to the Performance Analyzer dialog box. It contains a tab for each type of object the utility can document, and a tab displaying all the existing database objects.

12. On the **Tables** tab, click **Options**.

    The Print Table Definition dialog box opens.

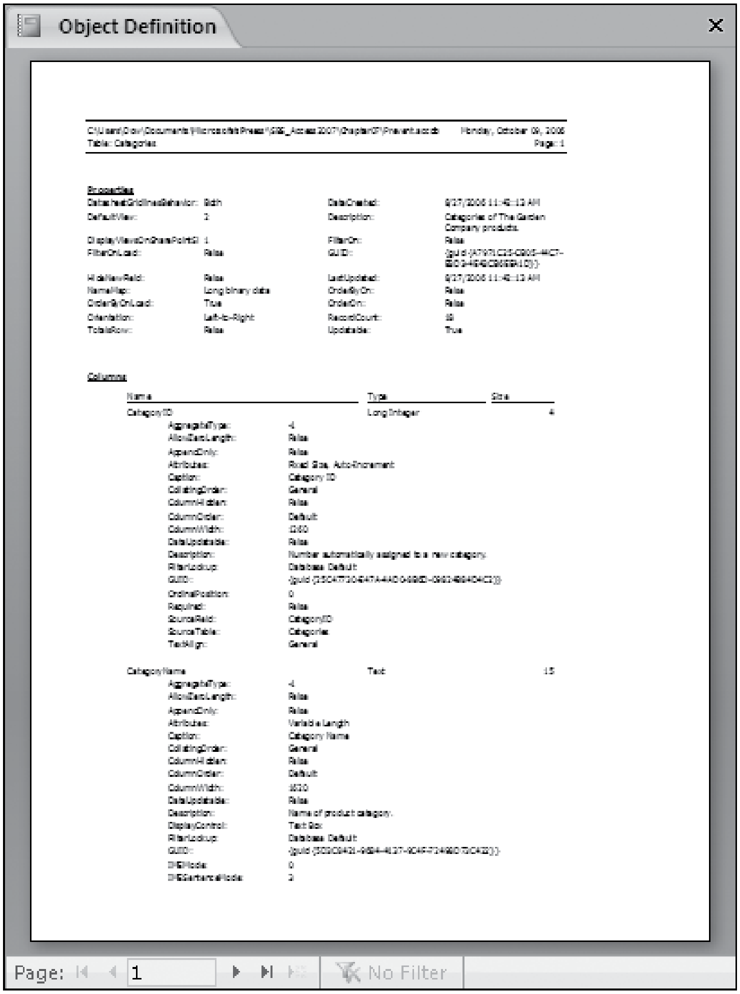


    The dialog box offers print options associated with the objects on the selected dialog box tab. The options differ for each tab, but all are similar to these, in that you can use them to specify the documentation to include for each type of object.

13. In the **Print Table Definition** dialog box, click **Cancel**.
14. On the **All Object Types** tab, click **Select All**, and then click **OK** to start the documentation process.

> **Tip** You can't save the report generated by the Documenter utility, but you can export it as a Word RTF file, Access database, text file, XML file, or HTML document. To do so, right-click the report, point to Export, and then click the format you want.

When the process finishes, Access displays a report in Print Preview. This report can run to hundreds of pages, so you probably don't want to print it. However, it is a good idea to create and save a report such as this for your own databases, in case you ever need to reconstruct them.



CLOSE the Object Definition report and the *Prevent* database. Then exit Access.

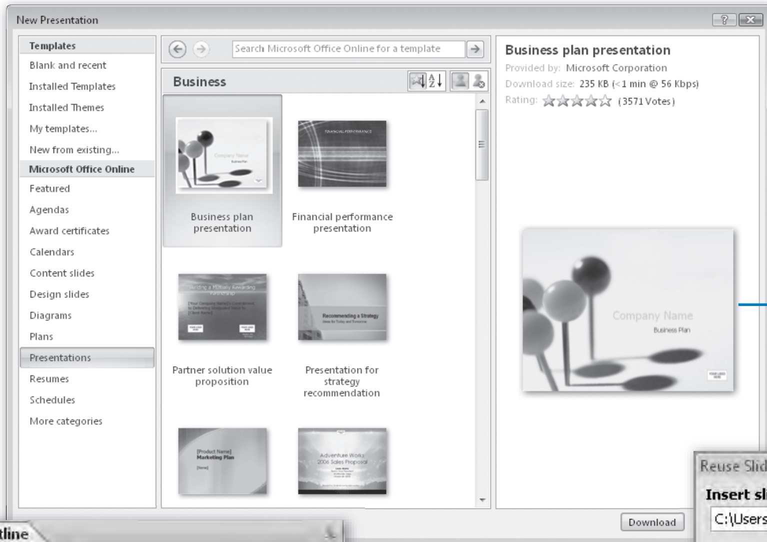
Key Points

- You can set properties that restrict the type and amount of data that can be entered into an Access database.
- You can quickly enact conditional changes by running an action query.
- The Data Type setting restricts entries to a specific type of data: text, numbers, dates, and so on. The Field Size property for the Text, Number, and AutoNumber data types restricts the number of characters allowed in a text field or the number of digits allowed in a number or AutoNumber field. The Input Mask property controls the format in which data can be entered.
- You can use a validation rule to precisely define the information that will be accepted in one or several fields in a record. At the field level, Access tests each entry against the rule when you attempt to leave a field. At the table level, Access tests the content of several fields against the rule when you attempt to leave a record. In both cases, Access rejects any entry that doesn't comply with the rule.
- For fields with a fixed set of possible entries, you can use a lookup field to ensure that users enter the right information. This helps prevent inconsistencies, thus making it easier to sort and search your data.
- You can use an update query to quickly perform an action, such as replacing the contents of a field, based on the results of a query.
- You can use a delete query to quickly delete records that meet specific criteria. You should always back up your database before running a delete query, and you must exercise caution when deleting records in this way. The effects of a delete query can be far-reaching, and you can't recover deleted records.
- There are several utilities that you can use to keep your database running smoothly—Compact And Repair Database, Performance Analyzer, Database Documenter, and Microsoft Office Diagnostics. You can keep your application healthy by taking advantage of these utilities before Access indicates there is a problem with your database.

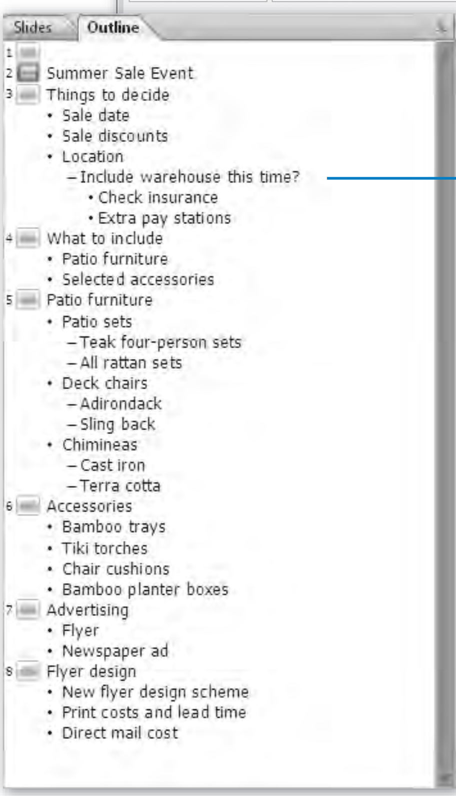
Part IV

Microsoft Office PowerPoint 2007

Chapter at a Glance



Quickly create a presentation, **page 376**



Convert an outline to a presentation, **page 383**

Reuse existing slides, **page 385**

13 Starting a New Presentation

In this chapter, you will learn to:

- ✔ Quickly create a presentation.
- ✔ Create a presentation based on a ready-made design.
- ✔ Convert an outline to a presentation.
- ✔ Reuse existing slides.

To work efficiently with Microsoft Office PowerPoint 2007, you must be able to decide the best way to start a presentation. The New Presentation window provides several options for creating a new presentation:

- If you need help with both the presentation's content and its look, you can download a complete presentation from Microsoft Office Online and then customize it to meet your needs.
- If you have already created a presentation that is close enough in content and design to be a good starting point, you can use that presentation as the basis for the new one.
- If you have content ready but need help with the look of the presentation, you can base your presentation on one of the design templates that comes with PowerPoint. These templates include graphics, colors, fonts, and styles. You can also base your presentations on your own custom templates.
- If you have created an outline of a presentation in Microsoft Office Word, you can import the outline into PowerPoint to create an instant slide show.
- If you know what your content and design will be and you want to build the presentation from scratch, you can start with a blank presentation.

This chapter will help you become familiar with these methods so that you can decide the best approach for each new presentation you create.

In this chapter, you will create several new presentations: one based on an example from Office Online, one based on a practice file stored on your hard disk, one based on a design template, and one based on a Word outline. You will also add slides to a presentation and insert slides from one presentation into another.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Quickly Creating a Presentation

When you first start PowerPoint, a blank presentation is displayed in the presentation window, ready for you to enter text and design elements. If you want to create a presentation from scratch, this is the place to start.

Tip If you are already working in PowerPoint, you can open a new blank presentation by clicking the Microsoft Office Button, clicking New, and then in the New Presentation window, double-clicking Blank Presentation.

However, creating presentations from scratch is time-consuming and requires quite a bit of skill and knowledge about PowerPoint. Even people with intermediate and advanced PowerPoint skills can save time by capitalizing on the work someone else has already done. In the New Presentation window, you can preview and download presentations that are available from Office Online and then customize these templates to meet your needs. You can also use any presentation that you have already created and saved on your hard disk as the basis for the new presentation.

When you create a new presentation based on a template, you are not opening the template; instead you are creating a new file that has all the characteristics of the template. The new file is temporary until you save it.

In this exercise, you will create two new presentations: one based on an example from Office Online, and the other based on a practice file stored on your hard disk.

Troubleshooting Be sure your computer is connected to the Internet before starting this exercise. If it is not, you can read through the steps below but you won't be able to access the presentations available on Office Online.

USE the *Creating* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptStarting* folder.

BE SURE TO start PowerPoint before beginning this exercise.


Microsoft Office Button

1. Click the **Microsoft Office Button**, and then click **New**.

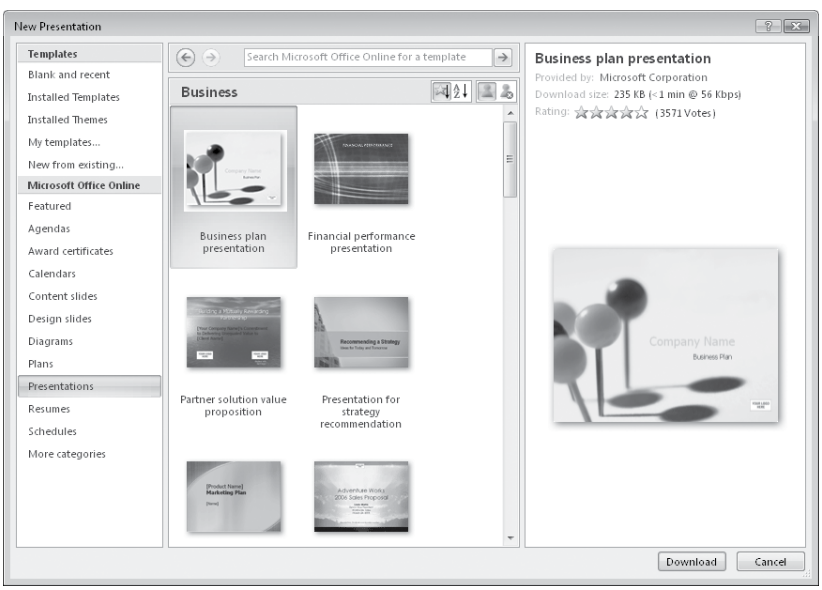
   The New Presentation window opens.

2. In the left pane, below **Microsoft Office Online**, click **Presentations**.

   The center pane now lists categories of presentations that are available from Office Online.

3. In the center pane, click **Business**.

   The center pane now displays images of all the ready-made business presentations that are available from Office Online. The selected presentation is indicated by an orange frame, and information about that presentation appears in the right pane.



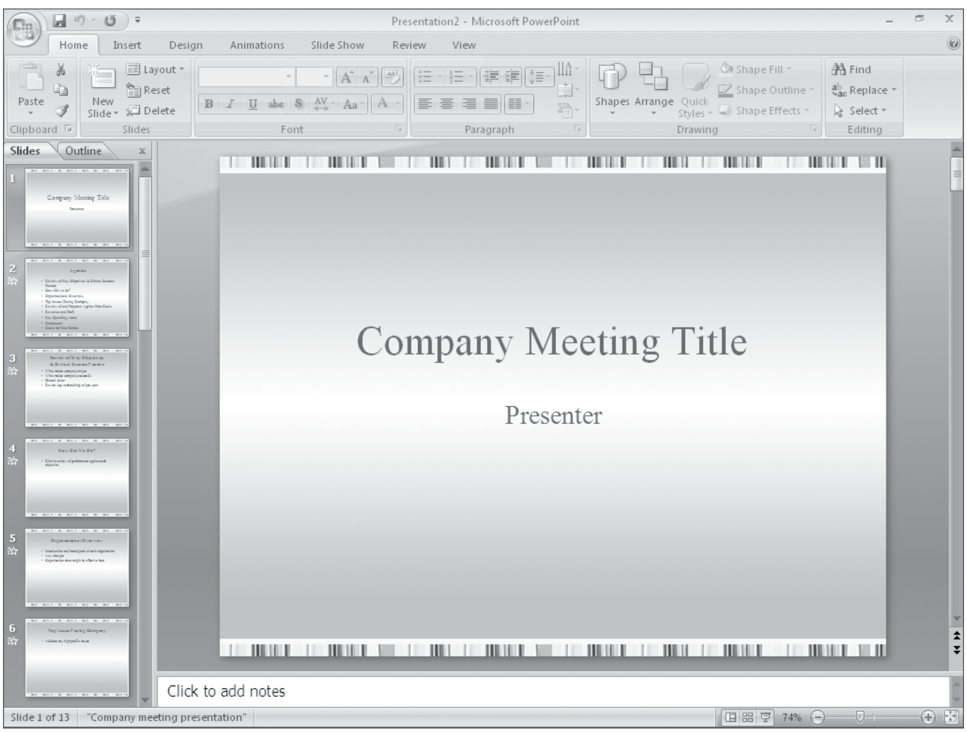
Troubleshooting Don't be alarmed if your list of presentations is different than ours. New presentations are continually being added. In fact, it is worth checking Office Online frequently, just to see what's new.

4. Scroll the center pane, noticing the wide variety of presentations available.
5. About half way down the pane, click the **Company meeting presentation** image, and then in the lower-right corner of the window, click **Download**.

   A message box tells you that you can download templates from Office Online only if you are running a genuine version of PowerPoint.
6. Click **Continue**.

Tip If you don't want this message box to appear every time you download a template, select the Do Not Show This Message Again check box before you click Continue.

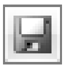
After your version of PowerPoint is validated, a presentation based on the selected template opens on your screen in Normal view. The Slides tab shows thumbnails of the slides, and the title slide appears in the Slide pane.




Next Slide

7. Below the scroll bar on the right side of the screen, click the **Next Slide** button repeatedly to display each slide of the presentation in turn.

   The slides contain generic instructions about the sort of information that you might want to include in a presentation for a company meeting. You can replace these instructions with your own text.


Save

8. On the **Quick Access Toolbar**, click the **Save** button.

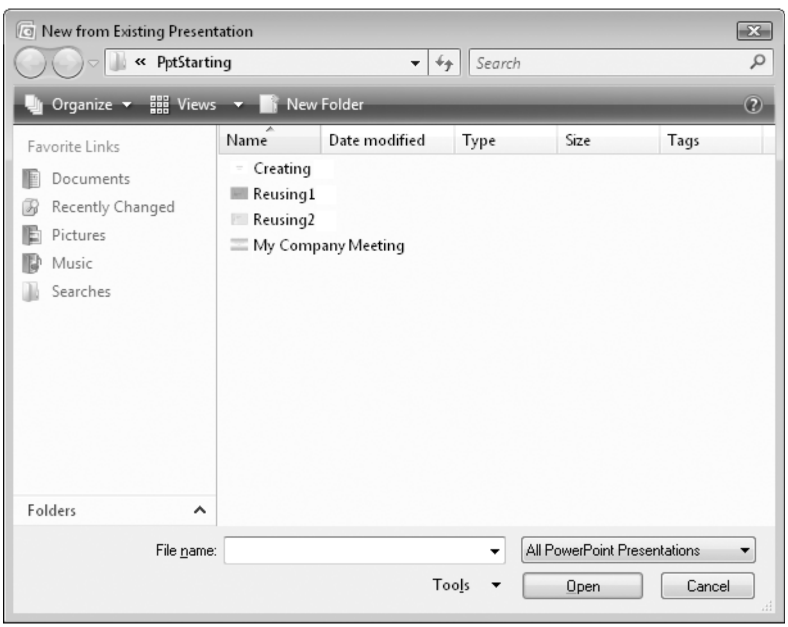
   PowerPoint suggests the title of the first slide as the name of the file.

9. Navigate to your *Documents\Microsoft Press\2007OfficeSBS\PptStarting* folder, and save the presentation with the name **My Company Meeting**.

   The title bar now displays *My Company Meeting* as the name of the open presentation.

10. Display the **New Presentation** window again, and then in the left pane, below **Templates**, click **New from existing**.

    The New From Existing Presentation dialog box opens.



11. With the contents of the *PptStarting* folder displayed, double-click the *Creating* file.

A quick glance at the title bar tells you that instead of opening the *Creating* presentation, PowerPoint has opened a new presentation based on *Creating*.

12. On the **Quick Access Toolbar**, click the **Save** button.

    Because this presentation is a new file, PowerPoint displays the Save As dialog box so that you can name the presentation.

13. Save the file in the *PptStarting* folder with the name **My Sales Meeting**.

    The title bar now displays *My Sales Meeting* as the name of the active presentation.

CLOSE the *My Sales Meeting* and *My Company Meeting* presentations.

Creating a Presentation Based on a Ready-Made Design

When you don't need help with the content of a presentation but you do need help with its design, you can start a new presentation based on a ***design template***. A design template is a blank presentation with formatting, a color scheme, and sometimes graphics already applied to it. You can base a presentation on a design template from Office Online, or you can design your own presentation and save it as a template.

When you create a presentation based on a design template, PowerPoint supplies a ***title slide*** and leaves it to you to add the other slides you need. You add a slide by clicking the Add Slide button in the Slides group on the Home tab. This technique adds a new slide with the default layout immediately after the current slide. If you want to add a slide with a different layout, you can select the layout you want from the Add Slide list.

Tip You can also add new slides by pressing keyboard shortcuts while you are entering text on the Outline tab. For more information, see "Entering Text" in Chapter 14, "Working with Slide Text."

In this exercise, you will start a new presentation based on a design template, add a new slide with the default layout, add slides with other layouts, and then delete a slide. There are no practice files for this exercise.

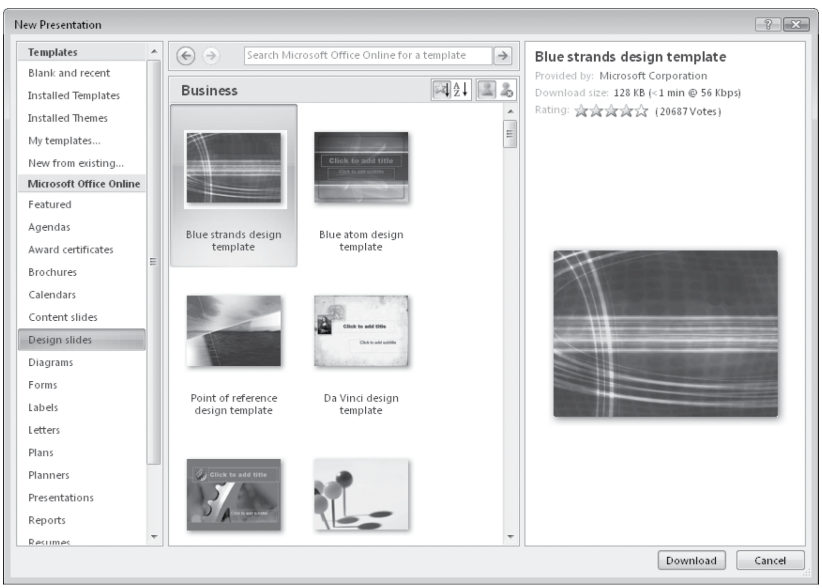
BE SURE TO start PowerPoint and close any open presentations before beginning this exercise.


Microsoft Office Button


Back

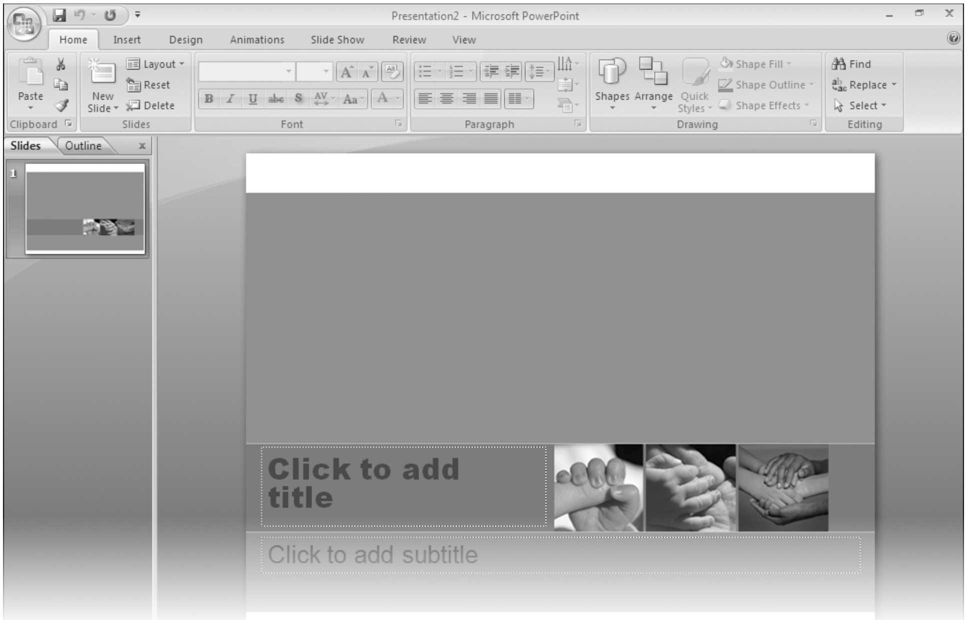
1. Click the **Microsoft Office Button**, and then click **New**.
2. In the left pane of the **New Presentation** window, below **Microsoft Office Online**, click **Design slides**.

   The center pane now displays categories of ready-made designs.
3. In the center pane, click each category in turn, scroll through the thumbnails of the various design collections, and click the **Back** button at the top of the center pane to return to the list of categories.
4. In the center pane, click the **Business** category.



5. Scroll about a third of the way down the list of templates, and click the **Trust design template**. Then in the lower-right corner of the window, click **Download**, and if the **Microsoft Office Genuine Advantage** message box appears, click **Continue**.

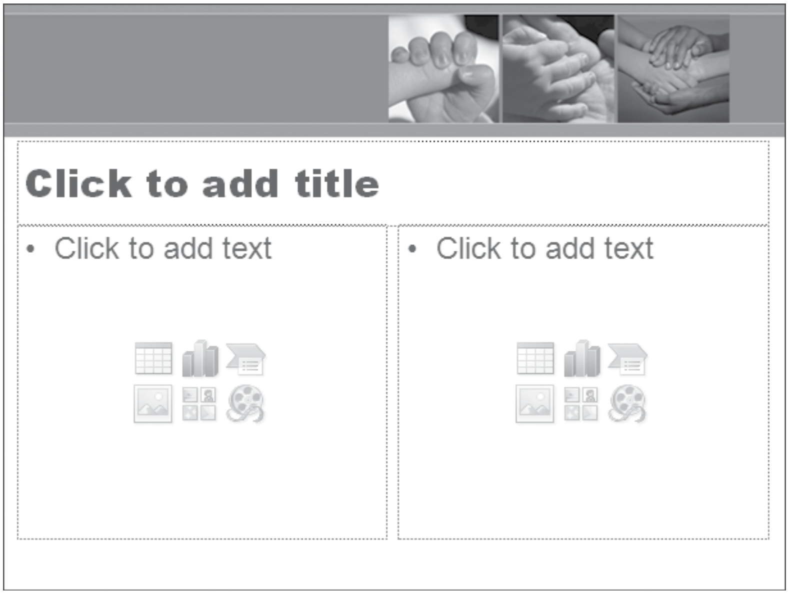
   A new presentation with one title slide opens on your screen in Normal view. The Slides tab shows a thumbnail of the slide, and the slide itself appears in the Slide pane.



6. On the **Home** tab, in the **Slides** group, click the **New Slide** button (not its arrow).

PowerPoint adds Slide 2 to the presentation with the default Title And Content layout. This layout is designed to accommodate a title and either text or graphic content—a table, chart, diagram, picture, clip art image, or movie clip.

7. In the **Slides** group, click the **New Slide** arrow, and then in the list, click **Two Content**.



8. In the **Slides** group, click the **New Slide** button.

   PowerPoint adds another slide with the Two Content layout. For all but the title slide, simply clicking the New Slide button adds a slide with the layout of the active slide.

9. Continue adding slides, selecting a different layout each time so that you can see what each one looks like.

10. At the top of the **Overview** pane, on the **Slides** tab, click **Slide 2**. Then in the **Slides** group, click the **Delete** button.

    PowerPoint removes the slide from the presentation and renumbers all the subsequent slides.

CLOSE the presentation without saving your changes.

Converting an Outline to a Presentation

You can insert an outline created in another program into a PowerPoint presentation. The text can be a Word document (.doc or .docx) or a ***Rich Text Format (RTF)*** file (.rtf). PowerPoint uses the heading styles in the inserted document to create slide titles and bullet points.

In this exercise, you will convert a Word outline into a presentation.

USE the *Converting* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptStarting* folder.

OPEN a new blank presentation.

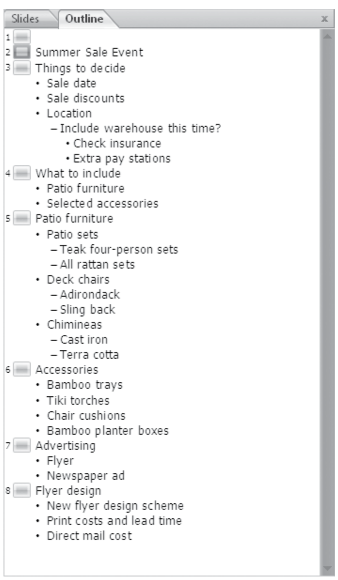
1. On the **Home** tab, in the **Slides** group, click the **New Slide** arrow, and then below the slide thumbnails, click **Slides from Outline**.

   The Insert Outline dialog box opens.

2. Navigate to your *Documents\Microsoft Press\2007OfficeSBS\PptStarting* folder, and then double-click the *Converting* file.

3. After the outline is converted, in the **Overview** pane, click the **Outline** tab to get an idea of the content of the presentation.

   PowerPoint has converted each level-1 heading into a slide title, each level-2 heading into a bullet point, and each level-3 heading into a subpoint.



4. On the **Outline** tab, right-click the empty title of **Slide 1**, which is blank, and then click **Delete Slide**.

CLOSE the presentation without saving your changes.

Tip You can start a new presentation from a Word outline by using the Open command. Click the Microsoft Office Button, and then click Open. In the Open dialog box, click the All PowerPoint Presentations setting, and in the list of file types, click All Files. Then locate and double-click the outline document you want to use.

Exporting a Presentation as an Outline

When you want to use the text from a presentation in another program, you can save the presentation outline as an .rtf file. Many programs, including the Windows and Macintosh versions of Word and older versions of PowerPoint, can import outlines saved in .rtf with their formatting intact.

To save a presentation as an .rtf file, follow these steps:

1. Click the **Microsoft Office Button**, and then click **Save As**.

   The Save As dialog box opens.

2. In the **File name** box, specify the name of the file.
3. Click the **Save as type** arrow, and then in the list, click **Outline/RTF**.
4. Navigate to the folder where you want to store the outline, and click **Save**.

   PowerPoint saves the presentation's outline in .rtf format with the designated name in the designated folder.

Reusing Existing Slides

If your presentations often include one or more slides that provide the same basic information, you don't have to recreate the slides for each presentation. For example, if you create a slide that shows your company's product development cycle for one new product presentation, you might want to use variations of that same slide in all new product presentations. You can easily tell PowerPoint to copy a slide and insert in a specific location in a different presentation. The slide will assume the formatting of its new presentation.

See Also For information about storing slides for reuse in a slide library, see the sidebar "Working with a Slide Library" in Chapter 27, "Enabling Collaboration by Using SharePoint."

In this exercise, you will insert slides from a presentation stored on your hard disk into the active presentation.

USE the *Reusing1* and *Reusing2* presentations. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\PptStarting* folder.

OPEN the *Reusing1* presentation.

1. On the **Slides** tab of the **Overview** pane, click **Slide 3**.

2. On the **Home** tab, in the **Slides** group, click the **New Slide** arrow, and then in the list, click **Reuse Slides**.

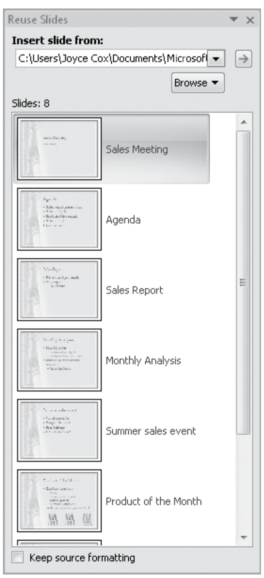
   The Reuse Slides task pane opens.

3. In the **Reuse Slides** task pane, click the **Open a PowerPoint File** link.

   PowerPoint displays the Browse dialog box with the contents of your *Documents* folder displayed.

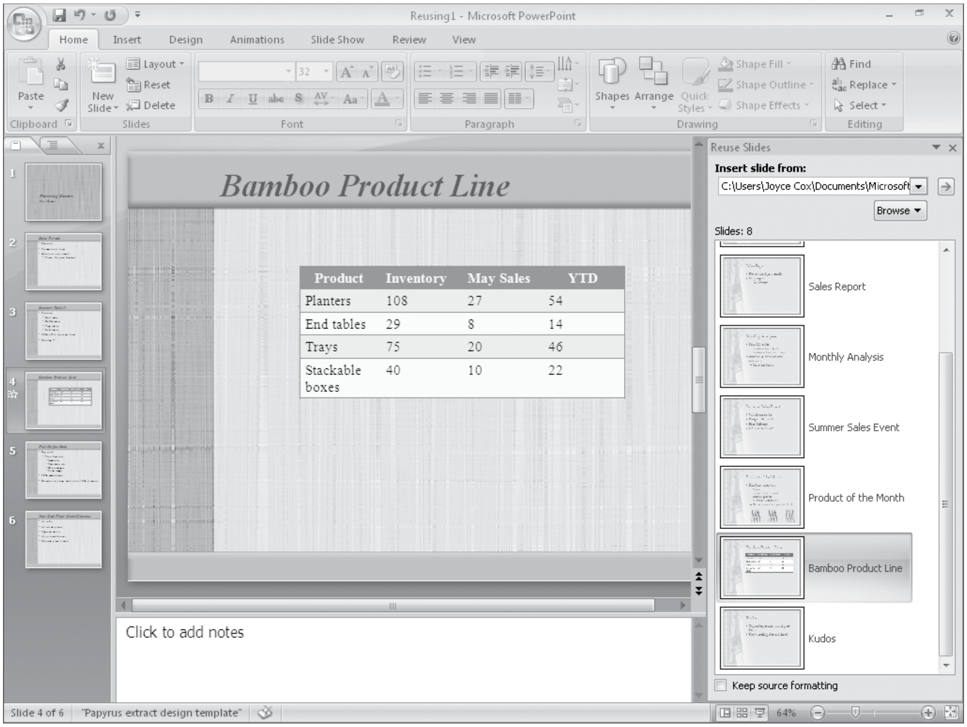
4. Navigate to your *Documents\Microsoft Press\2007OfficeSBS\PptStarting* folder, and then double-click the *Reusing2* presentation.

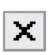
   Thumbnails of all the slides in the presentation appear in the Reuse Slides task pane.



5. Scroll the task pane, and click the seventh thumbnail, titled *Bamboo Product Line*.

   PowerPoint inserts the selected slide from the *Reusing2* presentation as Slide 4 in the *Reusing1* presentation. The slide takes on the design of the presentation in which it is inserted.




Close

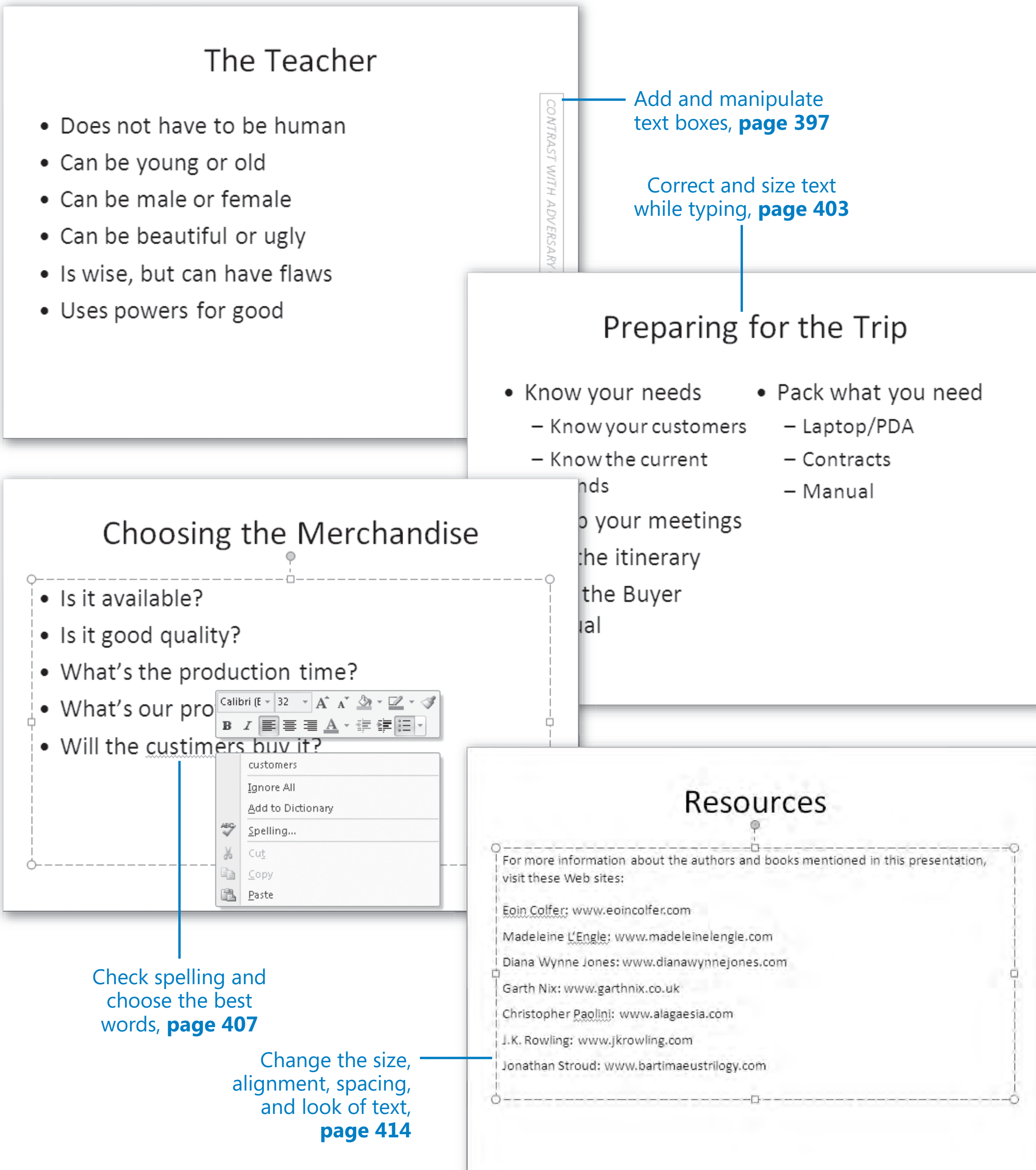
6. Click the task pane's **Close** button.

CLOSE the *Reusing1* presentation without saving your changes.

Key Points

- How you create a new presentation depends on whether you need help developing the content or the design.
- Office Online provides many presentation templates that you can customize to meet your needs.
- If you are required to use a particular design for a presentation, such as one with corporate colors and branding, it is often simpler to start with the design and then add your own content.
- Repurposing an existing presentation to fit the needs of a different audience is a useful technique that saves development time.
- Repurposing materials developed in other programs, such as Word, capitalizes on the compatibility of the 2007 Office system.
- Repurposing existing slides is another way to save time and ensure consistency.

Chapter at a Glance



Add and manipulate text boxes, **page 397**

Correct and size text while typing, **page 403**

Check spelling and choose the best words, **page 407**

Change the size, alignment, spacing, and look of text, **page 414**

14 Working with Slide Text

In this chapter, you will learn to:

- ✔ Enter text.
- ✔ Edit text.
- ✔ Add and manipulate text boxes.
- ✔ Correct and size text while typing.
- ✔ Check spelling and choose the best words.
- ✔ Find and replace text and fonts.
- ✔ Change the size, alignment, spacing, and look of text.

In later chapters of this book, we show you ways to add fancy effects to electronic slide shows to really grab the attention of your audience. But no amount of animation, jazzy colors, and supporting pictures will convey your message if the words on the slides are inadequate to the task. For most of your presentations, text is the foundation on which you build everything else, so this chapter shows you various ways to work with text to ensure that the words on your slides are accurate, consistent, and appropriately formatted.

In this chapter, you will learn how to enter and edit text on slides, on the Outline tab, and in text boxes. You will see how the AutoCorrect feature can help you avoid typographical errors, and how the spell-checking feature can help you correct misspellings after the fact. For those times when a word or phrase is correct but you want to substitute a different word or phrase, you will learn how to replace one word with another throughout a presentation by using the Find And Replace feature, which you also use to ensure the consistent use of fonts. Finally, you will vary the size, alignment, spacing, and look of words and phrases on individual slides.

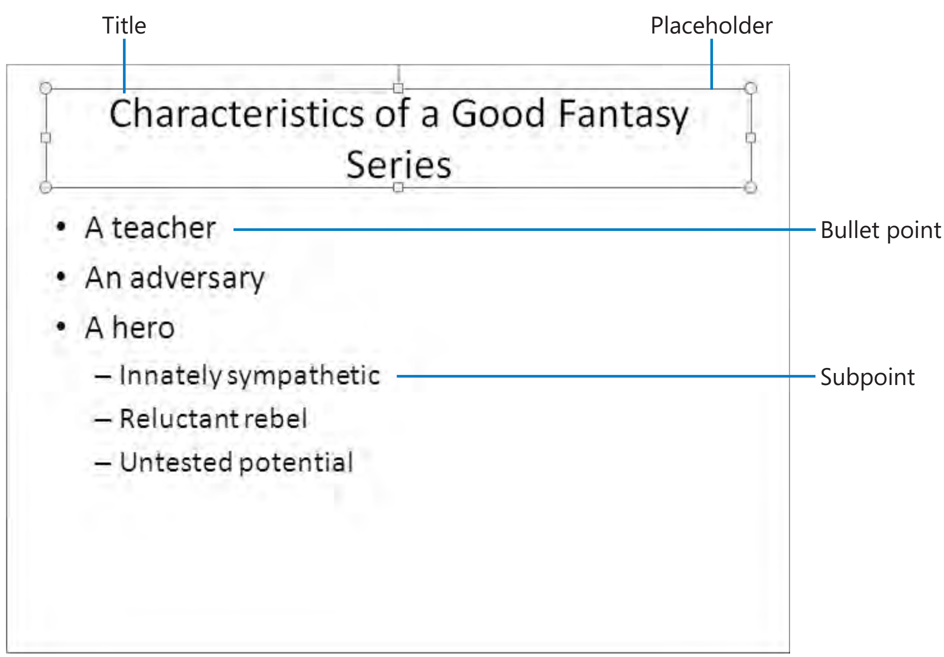
See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Entering Text

When you add a new slide to a presentation, the layout you select indicates the type and position of the objects on the slide with ***placeholders***. For example, a Title And Content slide has placeholders for a ***title*** and either a bulleted list with one or more levels of ***bullet points*** (and subordinate levels called ***subpoints***) or an illustration such as a table, chart, graphic, or movie clip. You can enter text directly into a placeholder on a slide in the Slide pane, or you can enter text on the Outline tab of the Overview pane, where the entire presentation is displayed in outline form.



> **Tip** If you want to add text to a slide that has no text placeholder—for example, if you want to add an annotation to a graphic—you can create an independent text box and enter the text there. For information about creating text boxes, see "Adding and Manipulating Text Boxes" later in this chapter.

When you point to a placeholder on a slide or to text on the Outline tab, the pointer changes to an I-beam. When you click the placeholder or text, a blinking insertion point appears where you clicked to indicate where characters will appear when you type. As you type, the text appears both on the slide and on the Outline tab.

In this exercise, you will enter slide titles, bullet points, and subpoints, both directly in slides and on the Outline tab. There are no practice files for this exercise.

> **BE SURE TO** start PowerPoint before beginning this exercise.
>
> **OPEN** a new, blank presentation.

1. In the **Slide** pane, click the slide's **Click to add title** placeholder.

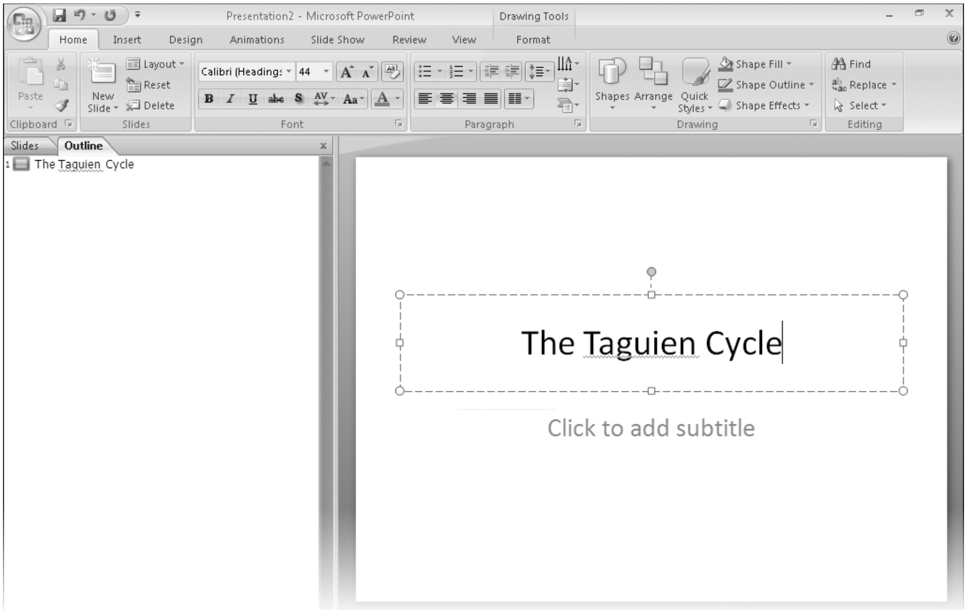
   A selection box surrounds the placeholder, and a blinking insertion point appears in the center of the box, indicating that the text you type will be centered in the placeholder.

2. Type The Taguien Cycle.

   Do not type the period. By tradition, slide titles have no periods. PowerPoint's spell-checking feature indicates with a red wavy underline that *Taguien* is a possible spelling error. This word is a proper name and is correct.

   > **Tip** If you make a typing error while working through this exercise, press Backspace to delete the mistake, and then type the correct text. For information about checking and correcting spelling, see "Checking Spelling and Choosing the Best Words" later in this chapter.

3. In the **Overview** pane, click the **Outline** tab, and notice that the text you typed also appears there.



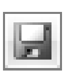
4. In the **Slide** pane, click the **Click to add subtitle** placeholder.

   The title placeholder is deselected, and the subtitle placeholder is selected.

5. Type A New Series for Young Adults, and then press Enter to move the insertion point to a new line in the same placeholder.

6. Type Judy Lew, Project Editor.

   As you enter titles and bullet points throughout the exercises, don't type any ending punctuation marks.


Save

7. On the **Quick Access Toolbar**, click the **Save** button, and save the presentation in the *PptWorking* folder with the name My Proposal.

   We won't tell you to save your work again in this exercise. Suffice it to say that you should save often.

8. Add a new slide with the **Title and Content** layout.

   See Also For information about adding slides, see "Creating a Presentation Based on a Ready-Made Design" in Chapter 13, "Starting a New Presentation."

   PowerPoint creates a new slide with placeholders for a title and a bulleted list. The Outline tab now displays an icon for a second slide, and the status bar displays *Slide 2 of 2*.

9. Without clicking anywhere, type Rationale.

If you start typing on an empty slide without first selecting a placeholder, PowerPoint enters the text into the title placeholder. The title appears on both the slide and the Outline tab.

10. On the **Outline** tab, click to the right of *Rationale*, and then press Enter.

    PowerPoint adds a new slide to the presentation, and an icon for Slide 3 appears in the Outline pane.

11. Press the Tab key.

    The Slide 3 icon changes to a bullet on Slide 2. The bullet is gray until you enter text for the bullet point.

12. Type **Lucerne currently has no offering for young adults**, and then press Enter.

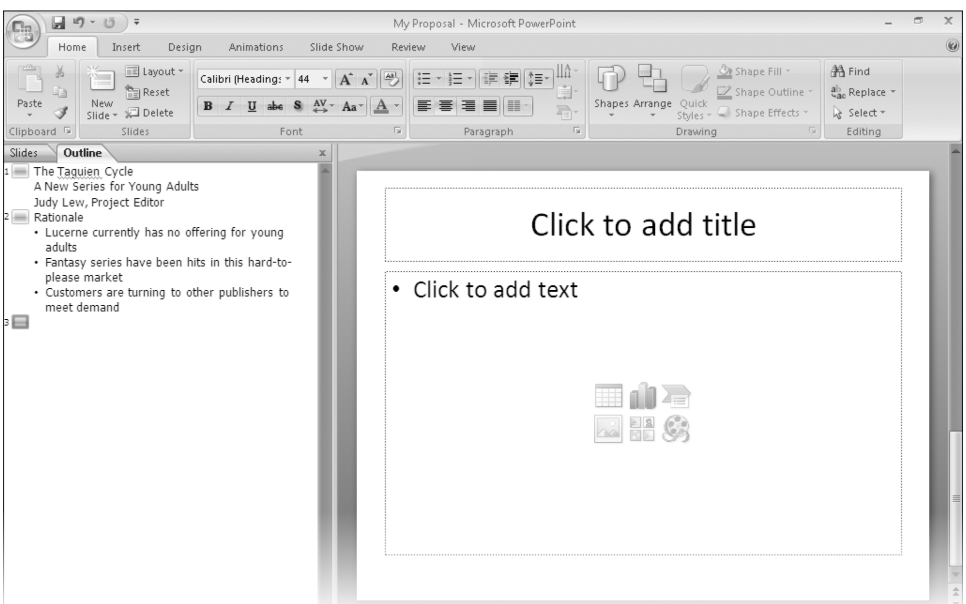
    PowerPoint adds a new bullet at the same level.

13. Type **Fantasy series have been hits in this hard-to-please market**, and then press Enter.

14. Type **Customers are turning to other publishers to meet demand**, and then press Enter.

15. Press Shift+Tab.

    On the Outline tab, the bullet changes into an icon for Slide 3. The new slide is displayed in the Slide pane.



16. Type **Characteristics of a Good Fantasy Series**, press Enter, and then press Tab.

    This slide title is too long to fit in the title placeholder at its default font size, so PowerPoint decreases the size to make it fit.

    See Also For more information about the AutoFit feature, see "Correcting and Sizing Text While Typing" later in this chapter.

17. Type **A teacher**, press Enter, type **An adversary**, press Enter, type **A hero**, and then press Enter.

Increase List Level

18. On the **Home** tab, in the **Paragraph** group, click the **Increase List Level** button.

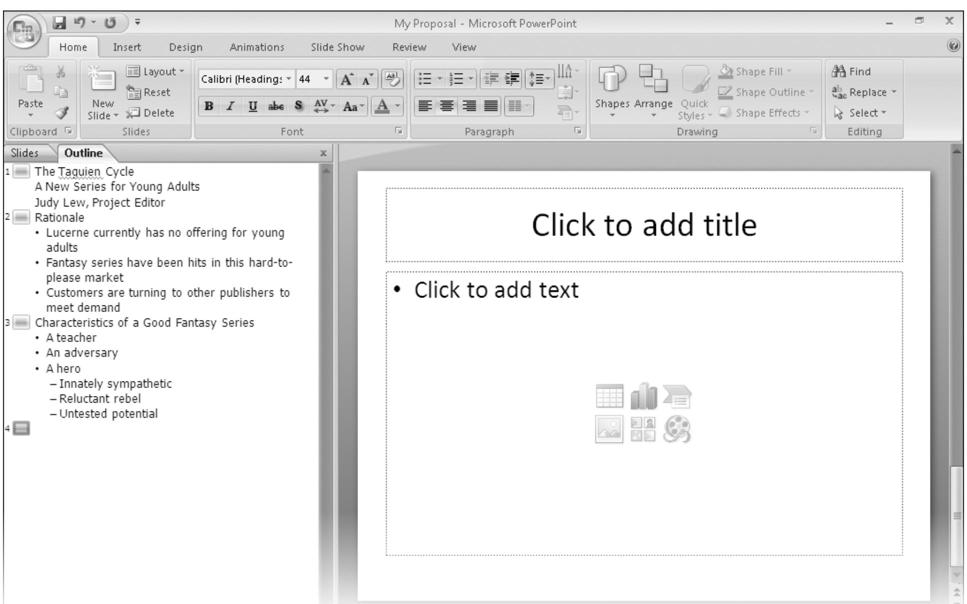
    PowerPoint creates a subpoint.

> **Tip** You can use the Increase List Level button to change slide titles to bullet points and bullet points to subpoints both on the slide and on the Outline tab. You can also use the Decrease List Level button to change subpoints to bullet points and bullet points to slide titles in both places. However, when you are entering text on the Outline tab, it is quicker to use keys—Tab and Shift+Tab—to perform these functions than it is to take your hands off the keyboard to use your mouse.

19. Type **Innately sympathetic**, press Enter, type **Reluctant rebel**, press Enter, and then type **Untested potential**.

20. Press Ctrl+Enter.

    Instead of creating another bullet, PowerPoint creates a new slide.



21. Save your work.

CLOSE the *My Proposal* presentation.

Editing Text

After you enter text, you can change it at any time. You can insert new text by clicking where you want to make the insertion and simply typing. Before you can change existing text, you have to ***select*** it by using the following techniques:

- Select an individual word by double-clicking it. The word and the space following it are selected. Punctuation following a word is not selected.
- Select adjacent words, lines, or paragraphs by dragging through them.
- Alternatively, position the insertion point at the beginning of the text you want to select, hold down the Shift key, and either press an arrow key to select characters one at a time or click at the end of the text you want to select.
- Select an entire slide title by clicking its slide icon on the Outline tab.
- Select an entire bullet point or subpoint by clicking its bullet on either the Outline tab or the slide.
- Select all the text in a placeholder by clicking inside the placeholder and then clicking Select and then Select All in the Editing group on the Home tab.

See Also For more information about the Select feature, see "Finding and Replacing Text and Fonts" later in this chapter.

Selected text appears highlighted in the location where you made the selection—that is, on either the slide or the Outline tab. To replace a selection, you type the new text. To delete the selection, you press either the Delete key or the Backspace key.

To move a selection to a new location, you can simply drag it. You can also move and copy text by using the Cut or Copy and Paste buttons in the Clipboard group on the Home tab. You can work on the slide itself when moving or copying text within a slide, but it is more efficient to work on the Outline tab when moving or copying text between slides.

If you change your mind about a change you have made, you can reverse it by clicking the Undo button on the Quick Access Toolbar. If you undo an action in error, you can click the Redo button on the Quick Access Toolbar to reverse the change.

To undo multiple actions at the same time, you can click the earliest action you want to undo in the Undo list. You can undo actions only in the order in which you performed them—that is, you cannot reverse your fourth previous action without first reversing the three actions that followed it.

> **Tip** The number of actions you can undo is set to 20, but you can change that number by clicking the Microsoft Office Button, clicking PowerPoint Options, clicking Advanced, and then in the Editing Options area, changing the Maximum Number Of Undos setting.

In this exercise, you will delete and replace words, as well as move bullet points and subpoints around on slides and on the Outline tab.

> **USE** the *Editing* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptWorking* folder.
>
> **OPEN** the *Editing* presentation.

1. On the **Outline** tab, in the **Slide 1** subtitle, double-click the word **New**.

   When you select text on either the Outline tab or the slide, a small toolbar (called the ***Mini toolbar***) containing options for formatting the text appears. If you ignore the Mini toolbar, it fades from view.

   See Also For information about using the Mini toolbar, see "Changing the Size, Alignment, Spacing, and Look of Text" later in this chapter.
2. Press the Del key.
3. In the **Slide 3** title, double-click **Good**, and then type **Hit** followed by a space.

   What you type replaces the selection. Notice that the text also changes in the Slide pane.
4. Press End, and then press Backspace seven times to delete the word *Series*.
5. On the slide, click the bullet to the left of *Reluctant rebel*.

   The entire subpoint is selected, including the invisible paragraph mark at the end.

> **Troubleshooting** When you want to work with a bullet point or subpoint as a whole, you need to ensure that the invisible paragraph mark at its end is included in the selection. If you drag across the text, you might miss the paragraph mark. As a precaution, hold down the Shift key and press End to be sure that the paragraph mark is part of the selection.

Cut

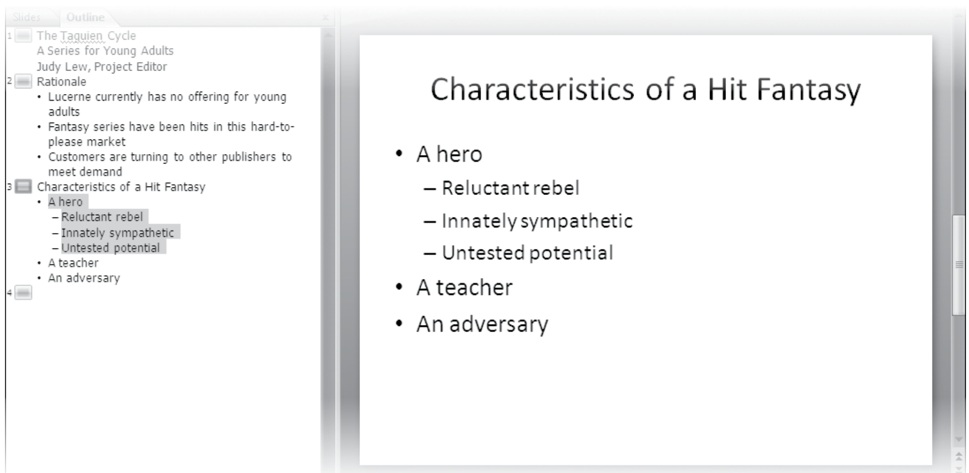
6. On the **Home** tab, in the **Clipboard** group, click the **Cut** button.

7. Click to the left of the word *Innately*, and then click the **Paste** button.

   The first two subpoints have effectively switched places.

8. On the **Outline** tab, click the bullet point to the left of *A hero* to select the bullet point and its subpoints.

9. Drag the selection up and to the left of *A teacher*.



Undo

10. On the **Quick Access Toolbar**, click the **Undo** button to reverse your last editing action.

    The Redo button appears on the Quick Access Toolbar, to the right of Undo. When you point to the Undo or Redo button, the name in the ScreenTip reflects your last editing action—for example, Redo Drag And Drop.

Redo

11. On the **Quick Access Toolbar**, click the **Redo** button to restore the editing action.

CLOSE the *Editing* presentation without saving your changes.

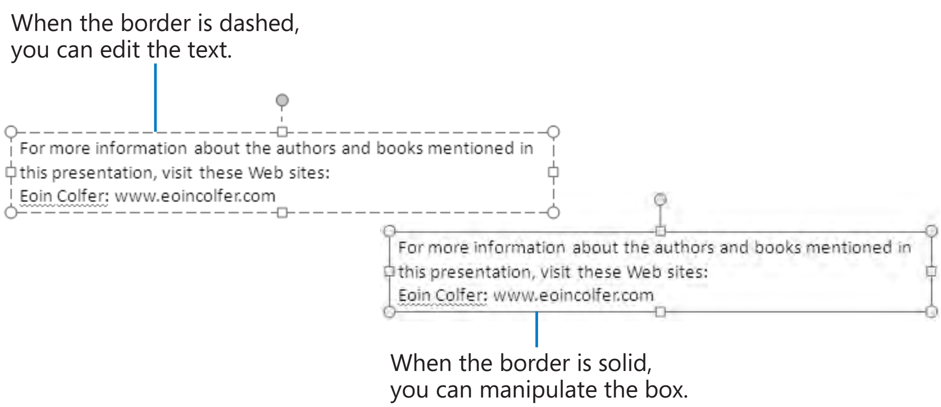
Adding and Manipulating Text Boxes

The size and position of the placeholders on a slide are dictated by the slide's design. Every slide you create with a particular design has the same placeholders in the same locations, and the text you type in them has the same format.

When you want additional text to appear on the slide, such as annotations or minor points that do not belong in a bulleted list, you can create a ***text box*** by using the Text Box button in the Text group on the Insert tab. You can create a text box in two ways:

- You can click the Text Box button, click the slide where you want the text to appear, and then type. The text box grows to fit what you type on one line, even expanding beyond the border of the slide if necessary.
- You can click the Text Box button, drag a box where you want the text to appear on the slide, and then type. When the text reaches the right boundary of the box, the height of the box expands by one line so that the text can wrap. As you continue typing, the width of the box stays the same, but the height grows as necessary to accommodate all the text.

When you click in a text box, an insertion point appears, and the box is surrounded by a dashed border. You can then edit the text—for example, you can add, delete, or correct words and punctuation. Clicking the dashed border changes it to a solid border. You can then manipulate the text box as a unit—for example, you can size, move, or copy it as a whole.



You can drag the ***handles*** around the border of the box to change its size and shape. By default, PowerPoint adjusts the box to fit the text within it. If you want to create a text box of a specific size or shape, you can right-click the box's border, click Format Shape, click Text Box in the Format Shape dialog box, and then change the settings. In this dialog box, you can also specify whether PowerPoint should shrink the text to fit the box if it won't all fit at the default size (18 points), and whether the text should wrap within the box.

Tip If you want to change the size, shape, or behavior of a placeholder on an individual slide, you can use the same techniques as those you use with text boxes. If you want to make changes to the same placeholder on every slide, you should make the adjustments on the presentation's master slide."

Sometimes you will want the text in a text box to be oriented differently than the rest of the text on the slide. When a text box is selected, a green rotating handle is attached to its upper-middle handle. You can drag this handle to change the angle of the text.

Tip You can also change the direction of text on the Text Box page of the Format Shape dialog box. In the Text Direction list, click one of the Rotate options. Or you can click Stacked to keep the individual characters horizontal but make them run from top to bottom in the box instead of from left to right.

When a text box is surrounded by a solid border, you can move or copy the text box anywhere on the slide. Dragging its border is the most efficient way to move a text box within one slide, and you can copy it just as easily by holding down the Ctrl key while you drag it.

To deselect the text box, you click a blank area of the slide. The border then disappears. If you want a text box to have a border when it is not selected, you can display the Format Shape dialog box, and on the Line Color page, select either Solid Line or Gradient Line. You can then fine-tune the border's color or gradient to achieve the effect you want.

In this exercise, you will select and deselect a placeholder to see the effect on its border. You will create one text box whose height stays constant while its width increases and another whose width stays constant while its height increases. You will manipulate these text boxes by rotating and moving one of them and sizing the other. You will also make a text box border a solid line that is visible when the text box is not selected.

USE the *TextBoxes* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptWorking* folder.

OPEN the *TextBoxes* presentation.

1. Move to **Slide 2**, and then on the slide, click the slide title.

   The placeholder is selected for editing, as indicated by the blinking insertion point and the dashed border.

2. Point to the border of the placeholder, and when the pointer changes to a four-headed arrow, click the mouse button once.

   The placeholder is selected as a unit, as indicated by the solid border. Although you won't usually want to change the size or location of a text placeholder, while the placeholder has a solid border, you can size and move it just like any other text box. Your changes will affect only the placeholder on the current slide, not corresponding placeholders on other slides.

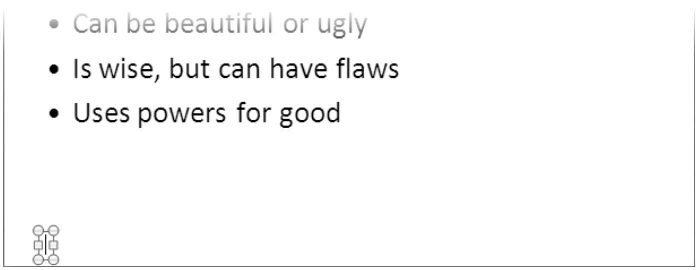
3. To deselect the placeholder, click outside it in a blank area of the slide.
4. Move to **Slide 5**, and then click the bulleted list placeholder.

5. On the **Insert** tab, in the **Text** group, click the **Text Box** button, and then point immediately below the lower-left handle of the placeholder for the bulleted list.

   The pointer changes shape to an upside-down T.

6. Click the slide to create a text box.

   A small, empty text box appears with a blinking insertion point inside it.

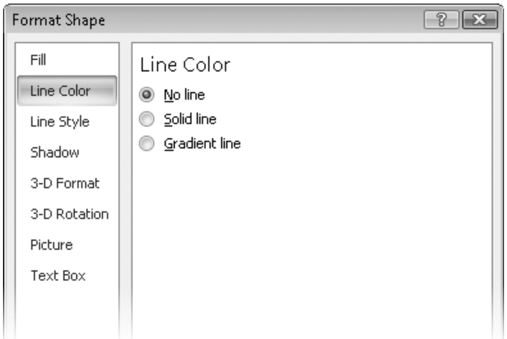


7. Type Contrast with Adversary on Slide 6.

   The width of the text box increases to accommodate the text as you type it.

8. To rotate the text so that it reads vertically instead of horizontally, drag the green rotating handle that is attached to the upper-middle handle 90 degrees clockwise.
9. Point to the border of the box (not to a handle), and then drag the box to the right edge of the slide.

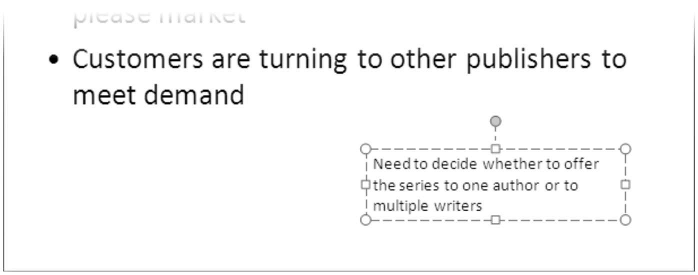
10. Right-click the border of the box, and then click **Format Shape**.
11. In the **Format Shape** dialog box, click **Line Color**.



12. Click **Solid line**, click the **Color** arrow, and in the top row of the **Theme Colors** palette, click the orange box (**Orange, Accent 6**). Then click **Close**.
13. Click a blank area of the slide to deselect the text box, and then move to **Slide 2**.
14. On the **Insert** tab, in the **Text** group, click the **Text Box** button, point to the center of the area below the bulleted list, and drag approximately 2 inches to the right and ½ inch down.

    No matter what height you make the box, it snaps to a standard height when you release the mouse button.
15. Type **Need to decide whether to offer the series to one author or to multiple writers**.

    The width of the box does not change, but the height of the box increases to accommodate the complete entry.



16. Click the border of the text box to select it as a unit, point to the solid border, and drag the box to the lower-left corner of the slide, so that its left border aligns with the text of the bullet points.

17. Point to the handle in the lower-right corner of the box, and drag up and to the right until the box is two lines high and the same width as the bullet points.
18. Click a blank area of the slide to deselect the text box.

CLOSE the *TextBoxes* presentation without saving your changes.

Changing the Default Font for Text Boxes

When you create a text box, PowerPoint applies default settings such as the font, size, and style—regular, bold, and italic—as well as other effects, such as underline, small capitals, and embossing. To save yourself some formatting steps, you can change the default settings for the presentation you are working on. Here's how:

1. In a new, blank presentation, create a text box and enter some text in it.
2. Select the text, and then on the **Home** tab, click the **Font** Dialog Box Launcher.
3. Select the font, font style, size, color, underline style, and effects you want to apply to all the text boxes you create from now on in this presentation, and then click **OK**.

   You can also add other effects, such as a fill color, outline formatting, or a special effect.
4. Select the text box itself, right-click its border, and then click **Set as Default Text Box**.
5. Create another text box on the same slide, and then enter text in it.

   The text appears with the new default settings.

Correcting and Sizing Text While Typing

We all make mistakes while typing test in a presentation. To help you ensure that these mistakes don't go uncorrected, PowerPoint uses the ***AutoCorrect*** feature to catch and automatically correct common capitalization and spelling errors. For example, if you type *teh* instead of *the* or *WHen* instead of *When*, AutoCorrect corrects the entry.

You can customize AutoCorrect to recognize misspellings you routinely type or to ignore text you do not want AutoCorrect to change. You can also create your own AutoCorrect entries to automate the typing of frequently used text. For example, you might customize AutoCorrect to enter the name of your organization when you type only an abbreviation.

In addition to using AutoCorrect to correct misspellings as you type, PowerPoint uses the AutoFit feature to size text to fit its placeholder. For example, if you type more text than will fit in a title placeholder, AutoFit shrinks the font size so that it all fits. The first time AutoFit changes the font size, it displays the AutoFit Options button to the left of the placeholder. Clicking this button displays a menu that gives you control over automatic sizing. For example, you can stop sizing text for the current placeholder while retaining your global AutoFit settings. You can also display the AutoCorrect dialog box, where you can change the AutoFit settings.

In this exercise, you will add an AutoCorrect entry and use AutoCorrect to fix a misspelled word. Then you will use AutoFit to size text so that it fits within its placeholder and to make a long bulleted list fit on one slide by converting its placeholder to a two-column layout.

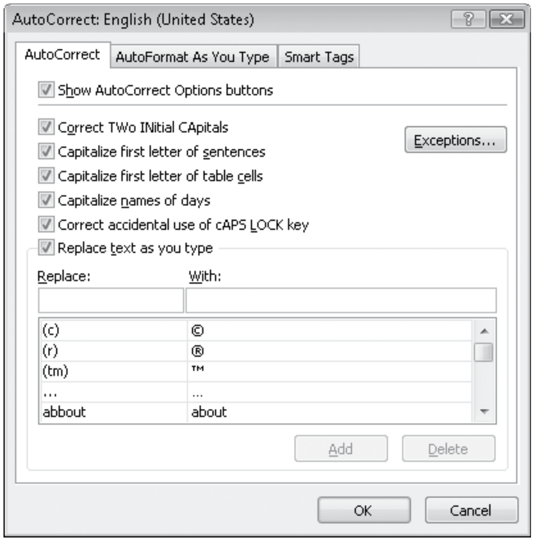
USE the *Correcting* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptWorking* folder.

OPEN the *Correcting* presentation.

Microsoft Office Button

1. Click the **Microsoft Office Button**, click **PowerPoint Options**, and then in the left pane of the **PowerPoint Options** window, click **Proofing**.
2. In the **AutoCorrect options** area, click **AutoCorrect Options**.

   The AutoCorrect dialog box opens.

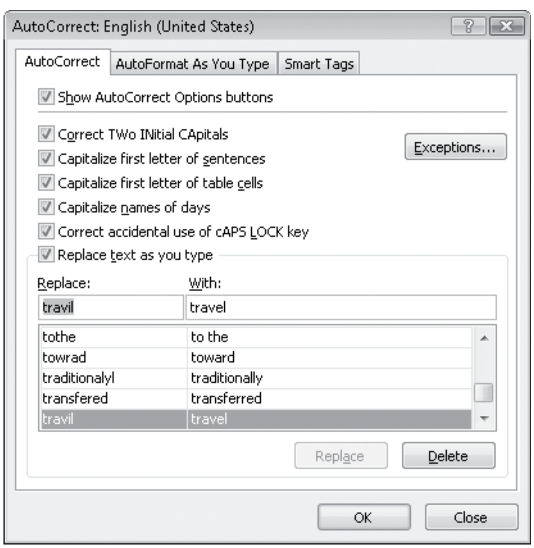


> **Troubleshooting** If the AutoCorrect tab is not active, click it to display its options.

3. In the lower part of the dialog box, scroll through the huge table of misspellings.

   When you type one of the entries in the first column, PowerPoint automatically substitutes the correct spelling from the second column.

4. In the **Replace** box above the table, type **travil**, and then press Tab.
5. In the **With** box, type **travel**, and then click **Add**.

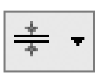


Now if you type *travil* in any presentation, PowerPoint will replace it with *travel*.

6. Click **OK** to close the **AutoCorrect** dialog box, and then click **OK** again to close the **PowerPoint Options** window.
7. Move to **Slide 4**, click to the left of the word *advisories*, type **travil**, and then press Space.

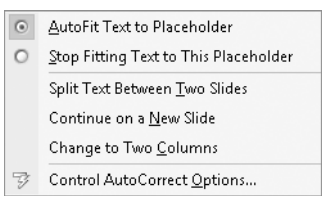
   PowerPoint corrects the word *travil* to *travel*.
8. Move to **Slide 3**, click to the right of the word *need* in the last bullet point, and then press Enter.
9. Press Tab to convert the new bullet point to a subpoint, type **Laptop/PDA**, and then press Enter.
10. Add **Contracts** and **Manual** as two additional subpoints, pressing Enter after each one.

    PowerPoint makes the text of the bulleted list smaller so that all the bullet points and subpoints fit in the placeholder. The AutoFit Options button appears in the lower-left corner of the slide.



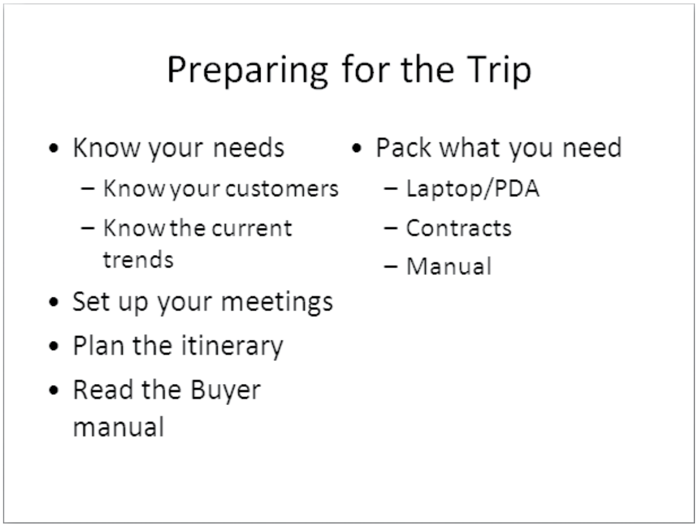
AutoFit Options

11. Click the **AutoFit Options** button to display a list of options.



12. Click **Change to Two Columns**.

    The placeholder is instantly formatted to accommodate a two-column bulleted list, with the last bullet point and its subpoints at the top of the second column. All the bullet points in both columns increase in size.
13. Click a blank area of the slide to deselect the placeholder.



CLOSE the *Correcting* presentation without saving your changes.

Smart Tags

If you frequently use certain types of information, such as the date and time, names, street addresses, or telephone numbers, you can take advantage of the ***Smart Tags*** feature, which enables PowerPoint to recognize the information. When this feature is turned on, PowerPoint displays a dotted line below the text to indicate that it has been flagged with a smart tag. Pointing to the underlined text displays the Smart Tag Actions button. You can click this button to display a menu of actions associated with that type of information.

You can check which types of information will be flagged with a smart tag by following these steps:

1. Click the **Microsoft Office Button**, click **PowerPoint Options**, click **Proofing**, and then click **AutoCorrect Options**.
2. In the **AutoCorrect** dialog box, click the **Smart Tags** tab.

To see what other smart tags are available, you can click More Smart Tags and explore a Web site that features smart tags developed by Microsoft and other companies.

Checking Spelling and Choosing the Best Words

The AutoCorrect feature is very useful if you frequently type the same misspelling. However, most misspellings are the result of erratic finger-positioning errors or memory lapses. You can use two different methods to ensure that the words in your presentations are spelled correctly in spite of these random occurrences:

- By default, PowerPoint's spelling checker checks the spelling of the entire presentation—all slides, outlines, notes pages, and handout pages—against its built-in dictionary. To draw attention to words that are not in its dictionary and that might be misspelled, PowerPoint underlines them with a red wavy underline. You can right-click a word with a red wavy underline to display a menu with a list of possible spellings. You can choose the correct spelling from the menu or tell PowerPoint to ignore the word. To turn off this feature, you can click the Microsoft Office Button, click PowerPoint Options, click Proofing, and then clear the Check Spelling As You Type check box.
- Instead of dealing with potential misspellings while you are creating a presentation, you can check the entire presentation in one session by clicking the Spelling button in the Proofing group on the Review tab. PowerPoint then works its way through the presentation, and if it encounters a word that is not in its dictionary, it displays the Spelling dialog box. After you indicate how PowerPoint should deal with the word, it moves on and displays the next word that is not in its dictionary, and so on.

The English-language version of the 2007 Office release includes English, French, and Spanish dictionaries. If you use a word or phrase from a different language, you can mark it so that PowerPoint doesn't flag it as a misspelling.

You cannot make changes to PowerPoint's main dictionary, but you can add correctly spelled words that are flagged as misspellings to PowerPoint's supplemental dictionary (called CUSTOM.DIC). You can also create and use custom dictionaries and use dictionaries from other Microsoft programs.

PowerPoint can check your spelling, but it can't alert you if you are not using the best word. Language is often contextual—the language you use in a presentation to club members is different from the language you use in a business presentation. To make sure you are using words that best convey your meaning in any given context, you can use the ***Thesaurus*** to look up alternative words, or *synonyms*, for a selected word.

In this exercise, you will correct a misspelled word, mark a non-English word, and check the spelling of an entire presentation. You will then use the Thesaurus to replace a word on a slide with a more appropriate one.

USE the *Spelling* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptWorking* folder.

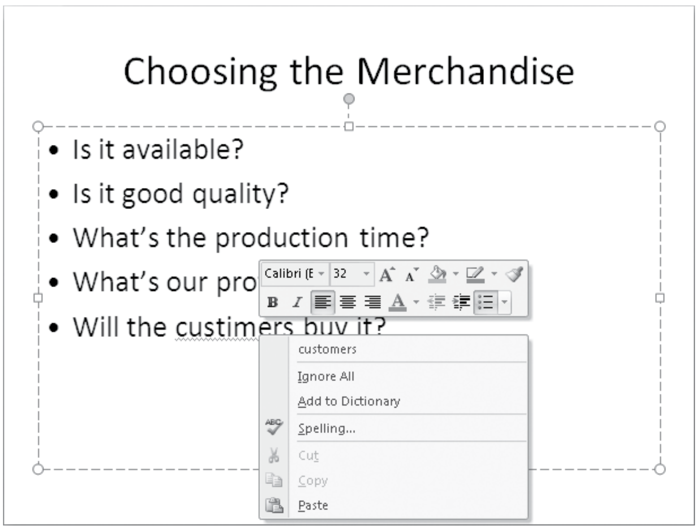
OPEN the *Spelling* presentation.

1. Move to **Slide 6**, add a fifth bullet point, and then type **Will the custimers buy it?**

   PowerPoint flags the word *custimers* as a possible error with a red wavy underline.

2. Right-click **custimers**.

   PowerPoint doesn't know whether you want to format the word or correct its spelling, so it displays both a Mini toolbar and a menu.



3. On the menu, click **customers** to replace the misspelled word.
4. Move to **Slide 5**.

   The Filipino word *Kumusta* has been flagged as a possible error.

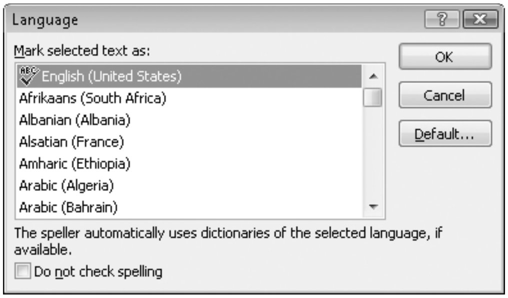
5. Right-click **Kumusta**.

   The spelling checker suggests *Kumquats* as the correct spelling.

6. Press Esc to close the menu without making a selection.

7. With the insertion point still in **Kumusta**, on the **Review** tab, in the **Proofing** group, click the **Language** button.

   The Language dialog box opens.

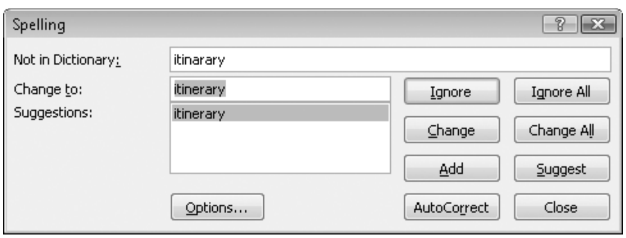


8. Scroll down the list of languages, click **Filipino**, and then click **OK**.

   Behind the scenes, PowerPoint marks *Kumusta* as a Filipino word, and the word no longer has a red wavy underline.

9. Move to **Slide 1**, and then on the **Review** tab, in the **Proofing** group, click the **Spelling** button.

   PowerPoint begins checking the spelling in the presentation. The spelling checker stops on the word *itinarary* and displays the Spelling dialog box.



10. In the **Spelling** dialog box, click **Change**.

    PowerPoint replaces *itinaray* with the suggested *itinerary* and then stops on the word *advizories*, suggesting *advisories* as the correct spelling.

> **Tip** You can click the AutoCorrect button in the Spelling dialog box to add the misspelling and the first suggested spelling of a word to the AutoCorrect substitution table.

11. Click **Change**.

    Next the spelling checker stops on *Dyck*. This term does not appear in the dictionary, but it is a proper name that is spelled correctly.

12. Click **Add**.

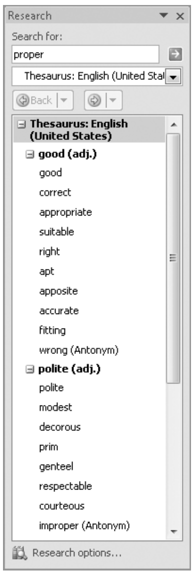
    The term *Dyck* is added to the CUSTOM.DIC dictionary. A message box tells you that PowerPoint has finished the spelling check.

Tip If you do not want to change a word or add it to the supplemental dictionary, you can click Ignore or Ignore All. The spelling checker then ignores that word or all instances of the word in the presentation in subsequent spell checking sessions.

13. Click **OK**.
14. On **Slide 5**, select the word **proper** (but not the space following the word).

15. On the **Review** tab, in the **Proofing** group, click the **Thesaurus** button.

    The Research task pane opens, displaying a list of synonyms with equivalent meanings.



Tip If you want to translate the selected word into a different language instead of find a synonym for it, you can click Translate in the Proofing group on the Review tab to display the Research task pane with a Translation area.

16. In the **Research** task pane, click the minus sign to the left of *polite* to bring more of the synonym list into view.
17. Below **good**, decide which word you want to substitute for the selection, point to the word until an arrow appears, click the arrow, and then click **Insert**.

    If you don't see an obvious substitute for the selected word, you can click a word that is close in the Thesaurus list and synonyms for that word will be displayed.

18. Close the **Research** task pane.

CLOSE the *Spelling* presentation without saving your changes.

> **Tip** For many words, there is a quicker way to find a suitable synonym. Right-click the word, and point to Synonyms. You can then either click one of the suggested words or click Thesaurus to display the Research task pane.

Finding and Replacing Text and Fonts

You can locate and change specific text in a presentation by using the buttons in the Editing group on the Home tab to do the following:

- Click Find to locate each occurrence of a word, part of a word, or a phrase. In the Find dialog box, you enter the text, and then click Find Next. You can specify whether PowerPoint should locate matches with the exact capitalization or ***case***—that is, if you specify *person*, PowerPoint will not locate *Person*—and whether it should locate matches for the entire text—that is, if you specify *person*, PowerPoint will not locate *personal*.
- Click Replace to locate each occurrence of a word, part of a word, or a phrase and replace it with something else. In the Replace dialog box, you enter the text you want to find and what you want to replace it with, click Find Next, and then click Replace to replace the found occurrence or Replace All to replace all occurrences. Again, you can specify whether to match capitalization and whole words.

  In the Replace list, you can click Replace Fonts to find and replace a font in a presentation. In the Replace Font dialog box, you can specify the font you want to change and the font you want PowerPoint to replace it with.
- Click a text placeholder on a slide, click Select in the Editing group, and then click Select All to select all the text in that placeholder. If you select the placeholder itself, clicking Select and then Select All adds all the other objects on that slide to the selection. You can then work with all the objects as a unit. Clicking Select and then Selection Pane displays the Selection And Visibility task pane, where you can specify whether particular objects should be displayed or hidden.

> **Tip** You might want to hide an object if you are using the slide in similar presentations for two different audiences, one of which needs more detail than the other.

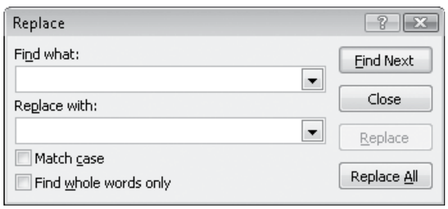
In this exercise, you will use the Replace feature to find and replace a word, and then you'll use Replace Fonts to find and replace a font. You will also display the Selection And Visibility task pane and hide an object on a slide.

USE the *Finding* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptWorking* folder.

OPEN the *Finding* presentation.

1. On the **Home** tab, in the **Editing** group, click the **Replace** button.

   The Replace dialog box opens.



> **Tip** You can move a dialog box on the screen so that it does not hide the text you are working with by dragging its title bar.

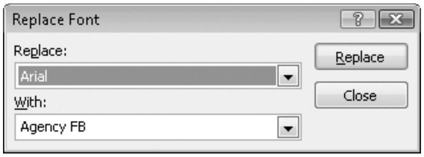
2. In the **Find what** box, type verdigris, and then press Tab.
3. In the **Replace with** box, type Verdigris.
4. Select the **Match case** check box to locate text that exactly matches the capitalization you specified and replace it with the capitalization you specified.
5. Click **Find Next**.

   PowerPoint finds and selects the word *verdigris* on Slide 3.
6. Click **Replace**.

   PowerPoint replaces *verdigris* with *Verdigris*, and then locates the next match.
7. Click **Replace All**.

   An alert box tells you that PowerPoint has finished searching the presentation and that the Replace All operation changed two occurrences of the text.
8. Click **OK**, and then in the **Replace** dialog box, click **Close**.
9. Click a blank area of the current slide to release the selection.
10. In the **Editing** group, click the **Replace** arrow, and then in the list, click **Replace Fonts**.

    The Replace Font dialog box opens.



11. With **Arial** selected in the **Replace** list, click the **With** arrow, and then in the list, click **Calibri**.

12. Click **Replace**.

All the Arial text in the presentation changes to Calibri.

13. Click **Close** to close the **Replace Font** dialog box.

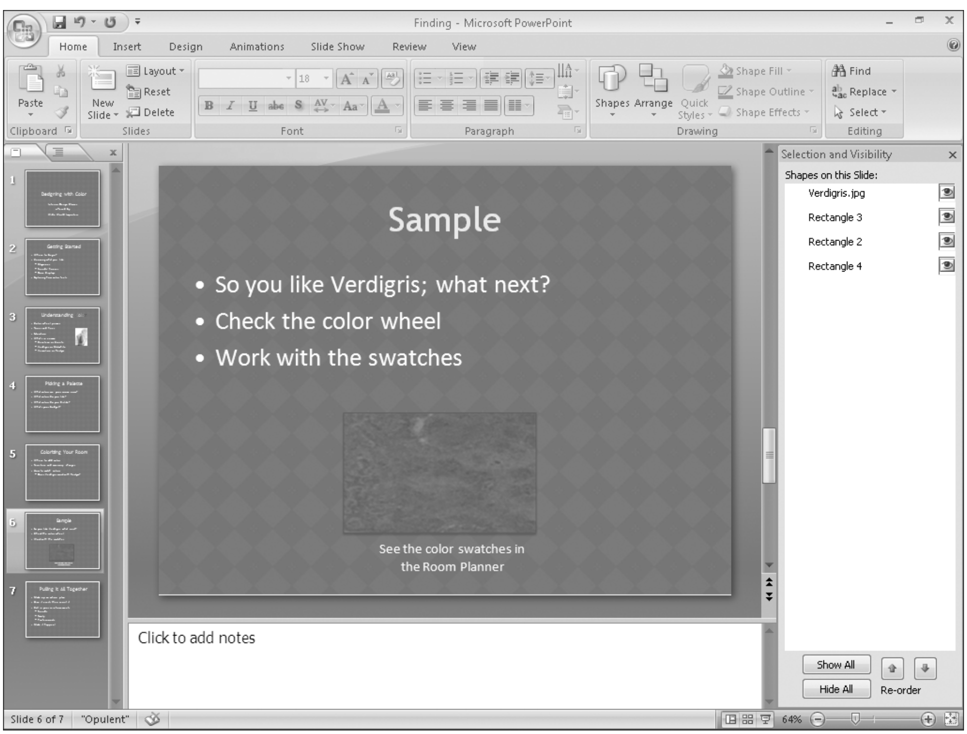
14. Move to **Slide 6**, and in the **Editing** group, click the **Select** button, and then click **Selection Pane**.

The Selection And Visibility task pane opens.

The task pane indicates that there are four objects on this slide, but a quick count reveals that only three of them are visible.

15. Below **Shapes on this Slide** in the task pane, click the box to the right of **Rectangle 4**.

An eye appears in the box to the right of Rectangle 4, and that object—a text box—is now displayed at the bottom of the slide.



16. In the task pane, click the box to the right of **Rectangle 4** again.

    The eye disappears, and the text box is now hidden again.

17. Close the **Selection and Visibility** task pane.

CLOSE the *Finding* presentation without saving your changes.

Changing the Size, Alignment, Spacing, and Look of Text

Earlier in this chapter we discussed the AutoFit feature, which shrinks the size of text that overflows a placeholder so that it fits in the allocated space. If you want to keep the size of the text in a presentation consistent, you can turn off this automatic text shrinking. You then have two ways to adjust the size of placeholders to fit their text:

- By manually dragging the handles around a selected placeholder
- By clicking Resize Shape To Fit Text on the Text Box page of the Format Shape dialog box

See Also For more information about AutoFit, see "Correcting and Sizing Text While Typing" earlier in this chapter.

Of course, you can also manually control the size of text by using options in the Font group on the Home tab. You can either click the Increase Font Size or Decrease Font Size button or set a precise size in the Font Size box.

To control the way text is aligned within a placeholder, you can click the text and then click one of the following alignment buttons in the Paragraph group on the Home tab:

- The Align Text Left button aligns text against the placeholder's left edge. It is the usual choice for paragraphs.
- The Center button aligns text in the middle of the placeholder. It is often used for titles and headings.
- The Align Text Right button aligns text against the placeholder's right edge. It is not used much for titles and paragraphs, but you might want to use it in text boxes.
- The Justify button aligns text against both the left and right edges, adding space between words to fill the line.

You can adjust the vertical spacing between all the lines of text in the placeholder by clicking the Line Spacing button in the Paragraph group and making a selection. If you want to adjust the space before or after a paragraph, you need to display the Paragraph dialog box, either by clicking the Line Spacing button and then clicking More at the bottom of the menu or by clicking the Paragraph Dialog Box Launcher. You can then adjust the Before and After settings for the paragraph as a unit.

In addition to changing the look of paragraphs, you can also manipulate the look of individual words. After selecting the characters you want to format, you can make changes by using buttons in the Font group on the Home tab, as follows:

- You can change the font.
- You can apply attributes, including bold, italic, underlining, and shadow and strikethrough effects.
- You can increase or decrease the space between the letters in a selection.
- You can change the capitalization of the words—for example, you can change small letters to capital letters.
- You can change the color of the characters.

In this exercise, you will change the size of the text in a placeholder and then adjust the size of the placeholder both automatically and manually. You will experiment with text alignment, decrease line spacing, and increase paragraph spacing. Then you will use buttons in the Font group to format words so that they stand out and look attractive.

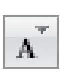
USE the *Changing* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptWorking* folder.

OPEN the *Changing* presentation.

1. Move to **Slide 2**, and in the **Slide** pane, click anywhere in the bulleted list.

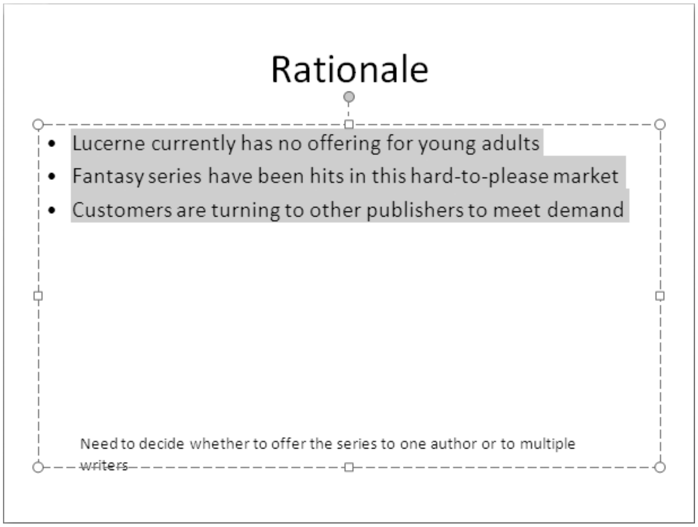
2. On the **Home** tab, in the **Editing** group, click the **Select** button, and then click **Select All**.

   The note at the bottom of the slide is not selected because it was entered in a separate text box, not in the placeholder.



Decrease Font Size

3. On the **Home** tab, in the **Font** group, click the **Decrease Font Size** button twice.

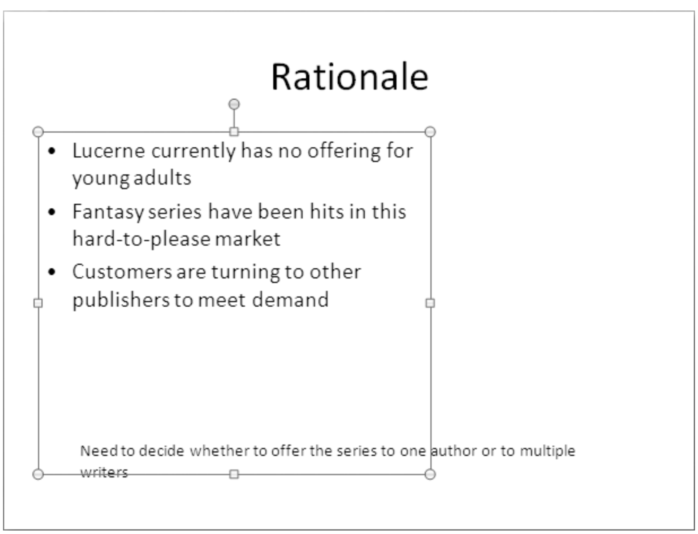


Font Size

4. Experiment with the size by clicking the **Font Size** arrow, and then pointing to various sizes in the list to get a live preview of the effect.
5. Finish by clicking **24** in the list.

   Now suppose you want to make room for a graphic to the right of the bulleted list.

6. Point to the placeholder's right-middle handle, and when the pointer changes to a two-headed arrow, drag to the left until the right border of the placeholder is aligned with the right end of the slide title.



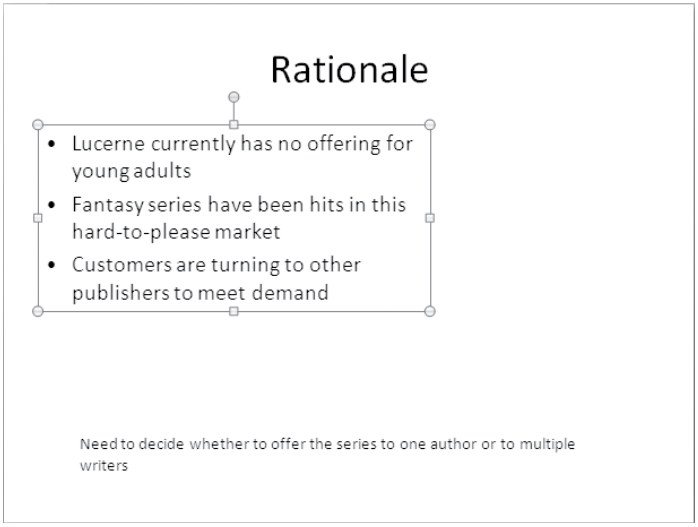
7. Right-click the placeholder's border, and then click **Format Shape**.

Troubleshooting This command is available only if you right-click the placeholder's border while the pointer is a four-headed arrow. If you don't see the command, click away from the menu, and try again.

The Format Shape dialog box opens.

8. Click **Text Box**, click **Resize shape to fit text**, and then click **Close**.

The placeholder shrinks in size so that it is just big enough to hold its text.



9. Move to **Slide 7**, and then click the text box containing the Web addresses.

If this text box contained only one paragraph, you could simply click the text box and then click a button in the Paragraph group to apply the paragraph formatting you want. However, the text box contains multiple paragraphs, and you first need to select them all.

10. On the **Home** tab, in the **Editing** group, click the **Select** button, and then click **Select All**.

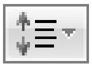

Align Text Left

11. In the **Paragraph** group, click the **Align Text Left** button.

The text is now left-aligned and easier to read.

Tip You want your slides to be as easy to read as possible, especially if you will be delivering your presentation to a large audience, some of whom might be sitting some distance away from the screen. Constantly evaluate whether the effects you apply to your slides enhance readability and understanding.

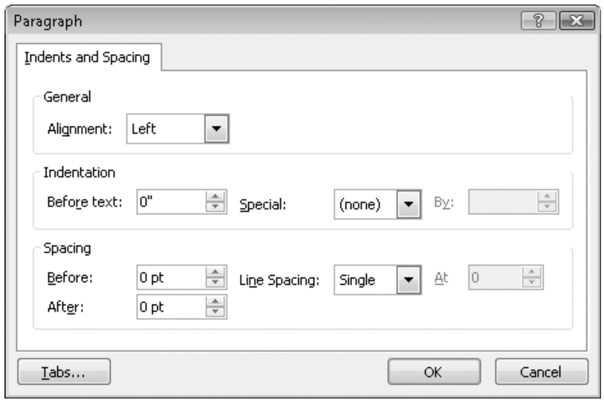
12. Select the seven Web site lines (not the first paragraph).


Line Spacing

13. In the **Paragraph** group, click the **Line Spacing** button, and then click **1.5**.

14. Click the first paragraph, and then click the **Paragraph** Dialog Box Launcher.

The Paragraph dialog box opens.



15. In the **Spacing** area, change the **After** setting to **12**, and then click **OK**.

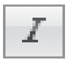
The line spacing and paragraph spacing have both increased.

16. Move to **Slide 5**, and then select all the text in the text box at the right side of the slide.

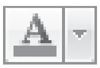

Change Case

17. In the **Font** group, click the **Change Case** arrow, and then in the list, click **UPPERCASE**.

The terms *lowercase* and *uppercase* come from the old days of typesetting, when individual letters were manually assembled into words, sentences, and paragraphs for printing. The small versions of the letters were kept in alphabetical order in the lower case, where they were easier for the typesetter to reach, and the capital versions were kept in the upper case.


Italic

18. With the text still selected, in the **Font** group, click the **Italic** button.


Font Color

19. Click the **Font Color** arrow, and then in the palette, point to each of the colors in the top **Theme Colors** row in turn.

    As you point, the selected text changes color to give you a live preview of the effect.

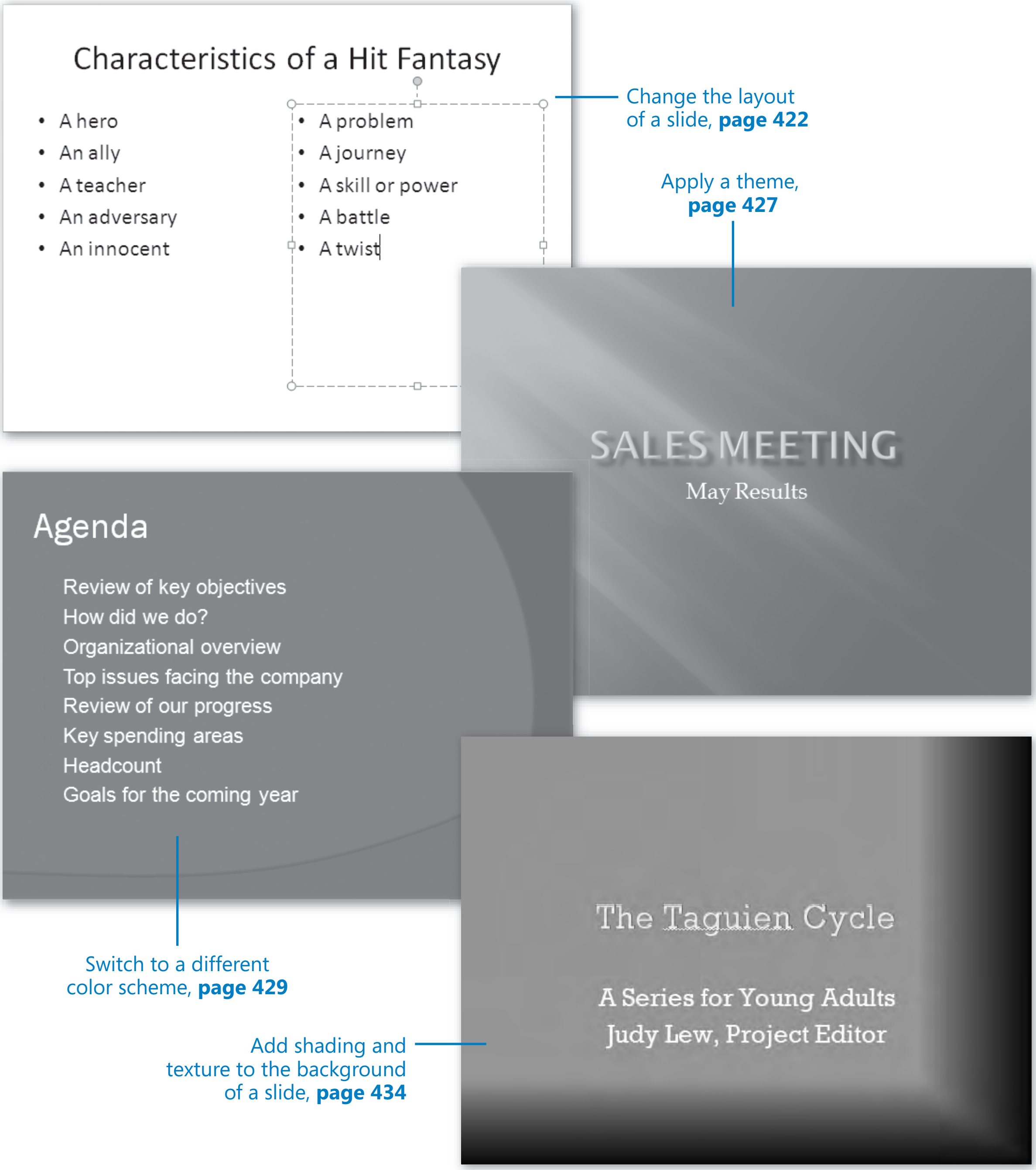
20. At the right end of the top **Theme Colors** row, click the orange box (**Orange, Accent 6**).
21. Click a blank area of the slide to see the effect of your changes.

CLOSE the *Changing* presentation without saving your changes, and if you are not continuing on to the next chapter, exit PowerPoint.

Key Points

- You can enter and edit text both on the Outline tab or directly on a slide, depending on which is most efficient at any particular time.
- Text in placeholders provides consistency across an entire presentation. But you are not limited to using placeholders. You can place text wherever you want it on a slide by using text boxes.
- PowerPoint provides assistance by correcting common spelling errors and adjusting the size of text so that it fits optimally on a slide.
- You can take advantage of the Find and Replace features to ensure consistent use of terms and fonts throughout a presentation.
- Although PowerPoint provides the structure for a presentation so that you can focus on your message, you can manually change the formatting, location, and size of text at any time.

Chapter at a Glance



15 Adjusting the Layout, Order, and Look of Slides

In this chapter, you will learn to:

- ✔ Change the layout of a slide.
- ✔ Rearrange slides in a presentation.
- ✔ Apply a theme.
- ✔ Switch to a different color scheme.
- ✔ Use colors that are not part of the scheme.
- ✔ Add shading and texture to the background of a slide.

In Chapter 14, "Working with Slide Text," you looked at ways to work with the text on your slides. In this chapter, you will step back and focus on big-picture issues that can affect the success of a Microsoft Office PowerPoint 2007 presentation.

For each slide to accomplish its purpose, it needs to present its content in the most effective way. The layout of individual slides and the order of slides in the presentation contribute significantly to the logical development of your message. And an overall consistent look, punctuated by variations that add weight exactly where it is needed, can enhance the likelihood that your message will be well received and absorbed by your intended audience.

In this chapter, you will change the layout of a slide, rearrange slides in a presentation, and apply a theme to a presentation. You will also switch to a different color scheme and use colors that are not part of the scheme. Finally, you will add shading and texture to the background of a slide.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Changing the Layout of a Slide

When you add a new slide to a presentation, you can specify which of several predefined layouts you want to use, or you can add a blank slide and create a custom layout. If you decide after you create a slide that you want it to have a different predefined layout, you can change the layout by displaying the slide, clicking the Layout button in the Slides group on the Home tab, and then making a selection.

See Also For information about adding slides, see "Creating a Presentation Based on a Ready-Made Design" in Chapter 13, "Starting a New Presentation."

If the slide already contains content, you can add the elements of a different layout to the existing layout without disturbing the existing content. For example, if you decide to add a chart to a slide that already contains a title and a bulleted list, clicking the Layout button and then clicking the Two Content layout adds a content placeholder to the right of the bulleted list placeholder.

If you make changes to the layout of a slide—for example, by sizing or moving a placeholder—but then decide you want to revert to the original layout, you can reapply the layout (without losing text you have already entered) by clicking the Reset button in the Slides group on the Home tab.

In this exercise, you will change the layout of a slide, change the size of the layout's placeholders, and then restore the layout.

USE the *Layout* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptAdjusting* folder.

BE SURE TO start PowerPoint before beginning this exercise.

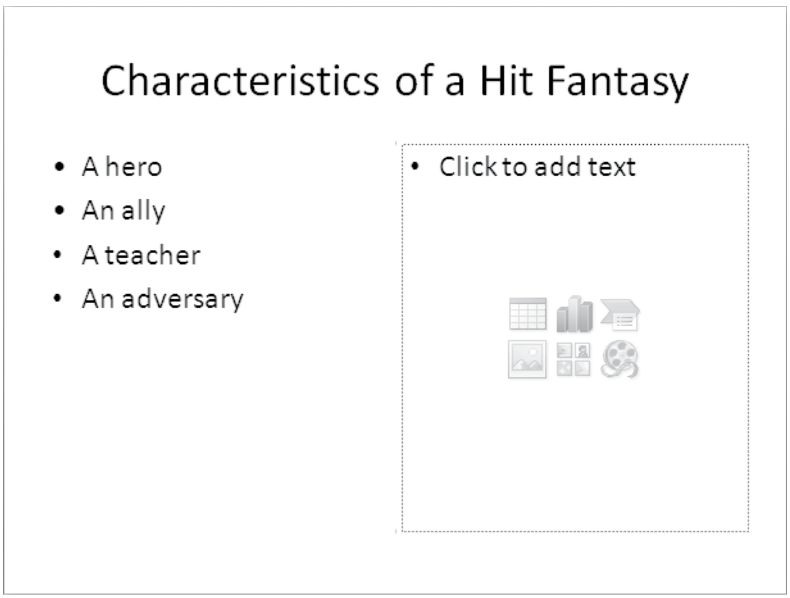
OPEN the *Layout* presentation and display the Outline tab.

1. Display **Slide 3**, and then on the **Home** tab, in the **Slides** group, click the **Layout** button.

   The Layout gallery includes the same layouts that are available for new slides.

2. Click the **Two Content** layout.

   PowerPoint adds a placeholder to the right of the bulleted list.



3. Click the bullet in the placeholder on the right side of the slide, and then type the following bullet points, pressing Enter after each one except the last:

   A problem

   A journey

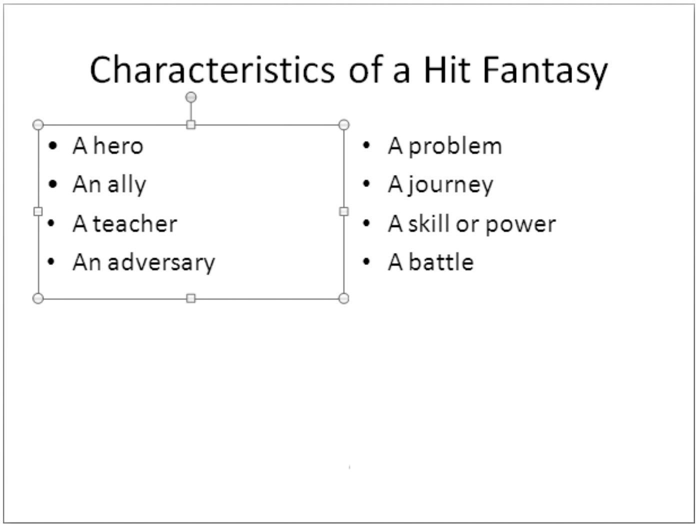
   A skill or power

   A battle

   On the Outline tab, the bullet points are grouped to indicate that they appear in different placeholders.

4. Drag the bottom middle handle of the right placeholder upward until the placeholder is big enough only for its bullet points.

5. Repeat step 4 for the left placeholder.



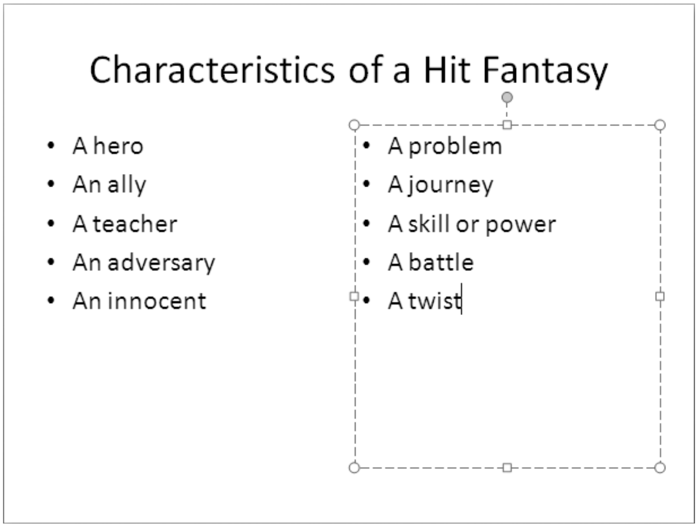
Now suppose you want to add more bullet points to each placeholder. You could manually enlarge the placeholders, but here's a quicker way.

6. On the **Home** tab, in the **Slides** group, click the **Reset** button.

   The placeholders expand to their original size.

7. Click to the right of *adversary* in the left placeholder, press Enter, and then type **An innocent**.

8. Click to the right of *battle* in the right placeholder, press Enter, and then type **A twist**.



CLOSE the *Layout* presentation without saving your changes.

Rearranging Slides in a Presentation

After you have created several slides, whether by adding them and entering text or by importing them from another presentation, you might want to rearrange the order of the slides so that they effectively communicate your message. You can rearrange a presentation in two ways:

- On the Slides tab, you can drag slides up and down to change their order.
- To see more of the presentation at the same time, you can switch to Slide Sorter view. You can then drag slide thumbnails into the correct order.

In this exercise, you will use the Slides tab and Slide Sorter view to logically arrange the slides in a presentation, and add a slide to a presentation.

USE the *Rearranging* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptAdjusting* folder.

OPEN the *Rearranging* presentation.

1. On the **Outline** tab, move to **Slide 3**, and notice the order of the bullet points.

   This summary slide lists all the main players in the series on the left, and the main plot requirements on the right.

2. On the **Outline** tab of the **Overview** pane, scroll through the presentation, noticing that the slide order is different than that of the bullet points on Slide 3.

   Tip On the Outline tab, you can collapse bullet points under slide titles so that you can see more of the presentation at one time. Double-click the icon of the slide whose bullet points you want to hide. Double-click again to redisplay the bullet points. To expand or collapse the entire outline at once, right-click the title of a slide, point to Expand or Collapse, and then click Expand All or Collapse All.

3. In the **Overview** pane, click the **Slides** tab, and then scroll so that you can see both Slide 5 and Slide 8.

4. Drag the thumbnail for **Slide 8** (*The Teacher*) upward to the space above the thumbnail for **Slide 6** (*The Problem*), but don't release the mouse button yet.

   The thumbnail itself remains in place, but a bar indicates where the slide will move to when you release the mouse button.

5. Release the mouse button.

   PowerPoint moves the slide to its new location and renumbers the subsequent slides.

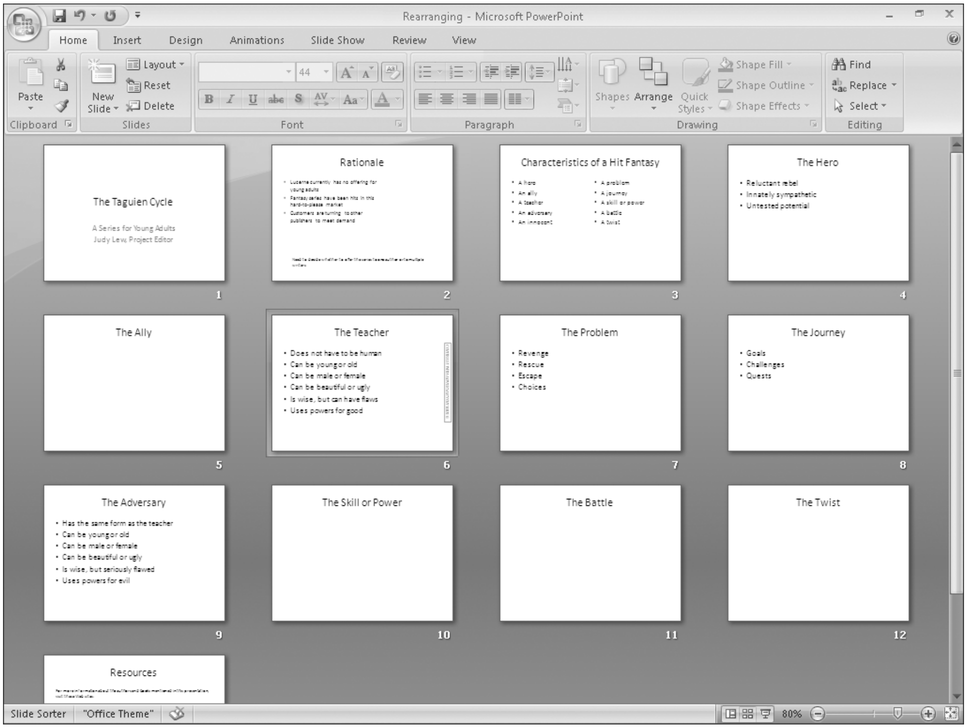
Slide Sorter

6. At the right end of the status bar, on the **View** toolbar, click the **Slide Sorter** button.

   PowerPoint displays the presentation as a set of thumbnails. Because you have only 13 slides in this presentation, there is room to make the thumbnails bigger so that they are easier to read.

Zoom In

7. On the slider at the right end of the status bar, click the **Zoom In** button twice to change the Zoom percentage to 80%.



8. Drag **Slide 9** (*The Adversary*) to the left of **Slide 7** (*The Problem*).

   Slide 9 moves to its new location, and again PowerPoint repositions and renumbers the subsequent slides in the presentation.

> **Tip** You can move slides from one open presentation to another in Slide Sorter view. Display both presentations in Slide Sorter view, and then on the View tab, in the Window group, click the Arrange All button. You can then drag slides from one presentation window to another.

If you check the results against Slide 3, you will see that the slide for *The Innocent* is missing. You can add a slide in Slide Sorter view, but you cannot enter or edit text in this view.

9. With **Slide 7** (*The Adversary*) still selected, add a **Title and Content** slide to the presentation.

   PowerPoint inserts the new slide after the selected slide.

10. Double-click **Slide 8**.

    PowerPoint returns to the previous view—in this case, Normal view—with Slide 8 active.

11. On the slide, click the title placeholder, and then type **The Innocent**.

CLOSE the *Rearranging* presentation without saving your changes.

Applying a Theme

When you create a presentation based on a template or a ready-made design, the presentation includes a theme—a combination of colors, fonts, formatting, graphics, and other elements that gives the presentation a coherent look. Even a presentation developed from scratch has a theme, albeit one that consists of only a white background and a very basic set of font styles and sizes.

If you want to change the theme applied to a presentation, you can choose a new one from the Themes group on the Design tab. With the Live Preview feature, you can easily try different effects until you find the one you want.

In this exercise, you will change the theme applied to a presentation that was created from a template. You will also apply a theme to a presentation that was created from scratch.

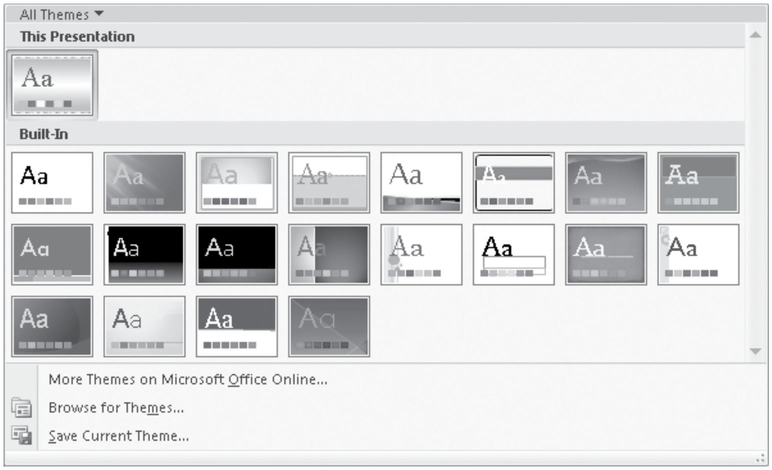
USE the *Theme1* and *Theme2* presentations. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\PptAdjusting* folder.

OPEN the *Theme1* and *Theme2* presentations.


More

1. With *Theme1* active, on the **Design** tab, in the **Themes** group, click the **More** button to the right of the thumbnails.

   The Themes gallery opens, displaying all the available themes.



2. Point to each theme thumbnail in turn to see a live preview of what the presentation will look like with that theme applied.
3. Click the **Technic** thumbnail to apply that theme to the entire presentation.

   Instead of a blue background with text in the Times New Roman font, the presentation now has a tan striped background with text in the Franklin Gothic font.
4. Switch to the *Theme2* presentation, display the **Themes** gallery, and then click the **Apex** thumbnail.

   Instead of a white background with text in the Calibri font, the presentation now has a gray watermarked background with text in the Lucida and Book Antiqua fonts.

CLOSE the *Theme1* and *Theme2* presentations without saving your changes.

Switching to a Different Color Scheme

Every presentation you create with PowerPoint 2007, even a blank one, has a set of colors associated with it. This **color scheme** consists of 12 complementary colors designed to be used for the following elements of a slide:

- Use the four Text/Background colors for dark or light text on a dark or light background.
- Use Accent 1 through Accent 6 for the colors of objects other than text.
- Use Hyperlink to draw attention to hyperlinks.
- Use Followed Hyperlink to indicate visited hyperlinks.

In the palette displayed in color galleries such as the Font Color gallery in the Font group on the Home tab, 10 of the 12 colors appear with light to dark gradients. (The two background colors are not represented in these palettes.)

Understanding color schemes can help you create professional-looking presentations that use an appropriate balance of color. You are not limited to using the colors in a presentation's color scheme, but because they have been selected by professional designers based on good design principles, using them ensures that your slides will be pleasing to the eye.

To view the color schemes you can apply to a presentation, you click the Colors button in the Themes group on the Design tab to display a Colors gallery with Live Preview capabilities. When you find the color scheme you want, click it to change the color scheme of the presentation.

If none of the color schemes is exactly what you are looking for, you can create your own by clicking Create New Theme Colors at the bottom of the Colors gallery and assembling colors in the Create New Theme Colors dialog box. After you save the scheme, you can apply it to one or all of the slides in a presentation.

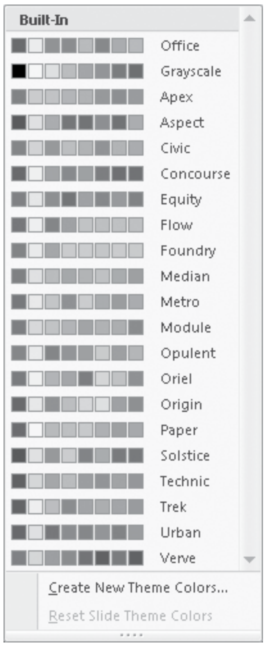
In this exercise, you will examine the color scheme of a presentation, apply a different color scheme to an entire presentation, create your own scheme, and change the color scheme of only one slide.

USE the *ColorScheme* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptAdjusting* folder.

OPEN the *ColorScheme* presentation.

1. On the **Design** tab, in the **Themes** group, click the **Colors** button.

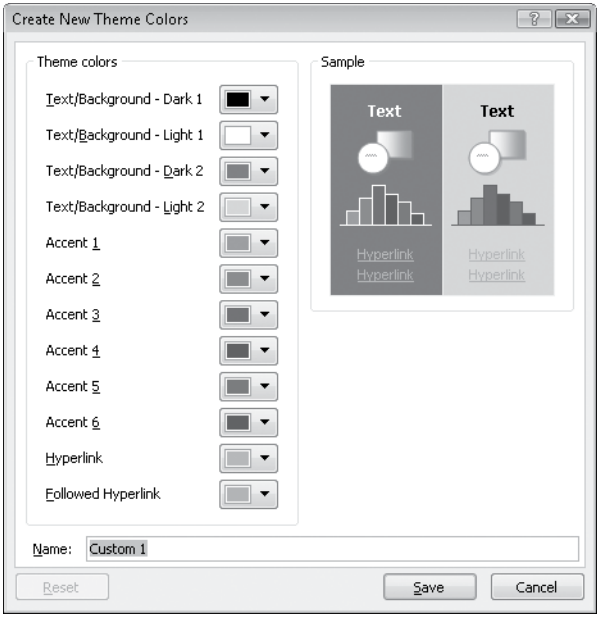
   The Colors gallery opens.



2. In the gallery, point to a few color schemes and watch the Live Preview effect on the active slide.
3. Click **Verve** to switch the color scheme of the theme applied to the presentation.

   Notice that the theme retains all its other characteristics, such as the font and background graphic; only the colors change. This color scheme is a good starting point.
4. In the **Themes** group on the **Design** tab, click the **Colors** button.
5. At the bottom of the **Colors** gallery, click **Create New Theme Colors**.

   The Create New Theme Colors dialog box opens, displaying the Verve theme colors.



6. In the **Theme colors** area, click the **Text/Background – Dark 2** button.

   A gallery of colors related to the Verve theme colors opens.

7. In the **Theme Colors** palette, click the box in the third row of the range below the dark blue box.

   When you are pointing to the correct box, the ScreenTip that appears is labeled *Dark Blue, Accent 6, Lighter 40%*.

8. At the bottom of the dialog box, click **Save**.

   The dialog box closes and PowerPoint applies the new color scheme to the presentation, changing the background color of all the slides to bright blue.

9. Display **Slide 2**, and in the **Themes** group, click the **Colors** button.

   Notice that your new custom color scheme appears in the Custom area at the top of the Colors gallery.

10. Right-click the **Opulent** color scheme, and then click **Apply to Selected Slides**.

    PowerPoint applies the Opulent color scheme to only the selected slide, changing its background color to purple.

CLOSE the *ColorScheme* presentation without saving your changes.

Changing a Theme's Fonts and Effects

In addition to changing a theme's color scheme, you can also change its fonts and effects by following these steps:

1. On the **Design** tab, in the **Themes** group, click the **Fonts** button.

   The Fonts gallery lists the combination of fonts that is used by each of the themes, in alphabetical order by theme. The top font in each combination is used for titles, and the bottom font is used for other slide text.
2. Click the font combination you want to use in the current presentation.

   > **Tip** You can create a custom font combination by clicking Create New Theme Fonts at the bottom of the gallery and then specifying the font combination you want in the Create New Theme Fonts dialog box.

3. On the **Design** tab, in the **Themes** group, click the **Effects** button.

   Like the Fonts gallery, the Effects gallery displays the combination of effects that is applied to shapes by each of the themes.
4. Click the effect combination you want to use in the current presentation.

   Your changes are stored with the presentation and do not affect the default theme.

Using Colors That Are Not Part of the Scheme

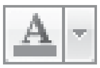
Although working with the 12 colors of a harmonious color scheme enables you to create presentations with a pleasing design impact, you might want to use a wider palette. You can add colors that are not part of the color scheme by selecting the element whose color you want to change and then choosing a standard color from the Colors palette or from the almost infinite spectrum of colors available in the Colors dialog box.

After you add a color, it becomes available on all the palettes that appear when you click a button that applies color—for example, the Font Color button in the Font group on the Home tab. The color remains on the palettes even if you change the theme applied to the presentation.

In this exercise, you will change the color of a slide title and will then apply the same color to other elements of the presentation.

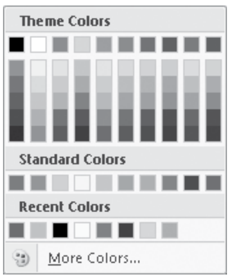
USE the *OtherColors* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptAdjusting* folder.

OPEN the *OtherColors* presentation.


Font Color

1. On **Slide 1**, select the title of the presentation, and then on the **Home** tab, in the **Font** group, click the **Font Color** arrow.

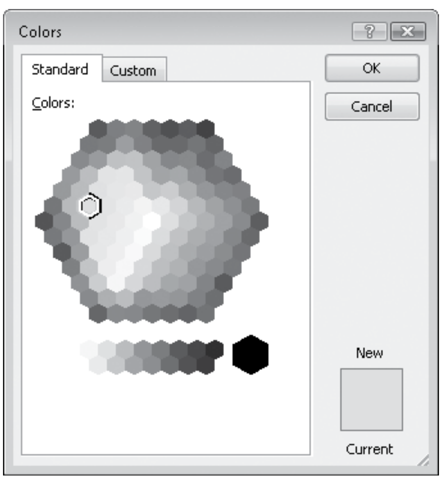
   A color palette appears.



2. At the bottom of the color palette, click **More Colors**.

   The Colors dialog box opens.

3. In the **Colors** spectrum, click in the brightest green shade.



4. Click **OK**.

   The title changes to the selected shade of green, outlined in red.

5. Display **Slide 5**, select the text following the third bullet point, and then click the **Font Color** arrow.

   The color that you just applied appears at the left end of the Recent Colors palette and is now available for use throughout the presentation.

6. Below **Recent Colors**, click the **Green** box.

More

7. On the **Design** tab, in the **Themes** group, click the **More** button to display the **Themes** gallery, and then click **Median**.

   The third bullet point retains the color you just applied even though you have switched themes.

CLOSE the *OtherColors* presentation without saving your changes.

Adding Shading and Texture to the Background of a Slide

In PowerPoint, you can customize the background of a slide by adding a solid color, a color gradient, a texture, or even a picture.

A color gradient is a visual effect in which a solid color gradually changes from light to dark or dark to light. PowerPoint offers several gradient patterns, each with several variations. You can also choose a preset arrangement of colors from professionally designed backgrounds in which the different colors gradually merge.

If you want something fancier than a gradient, you can give the slide background a texture, or you can use a picture. PowerPoint comes with several preset textures that you can easily apply to the background of slides.

Adding a Picture to the Slide Background

You can add a picture to a slide's background, either as one object or as a tiled image that fills the entire slide. Here's how:

1. On the **Design** tab, in the **Background** group, click the **Background Styles** button, and then click **Format Background**.
2. In the **Format Background** dialog box, click **Picture or texture fill**.
3. Click **File**, navigate to the folder that contains the picture you want to use, and then double-click the file name.
4. To make the picture fill the entire slide, select the **Tile picture as texture** check box.
5. To use the picture in the background of the current slide, click **Close**, or to use it in the background of all slides, click **Apply to All**.

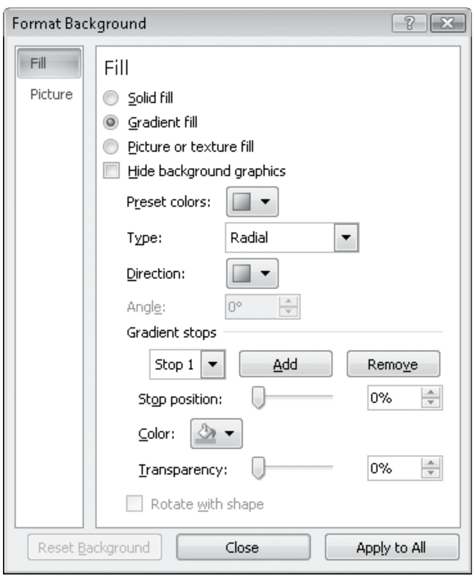
In this exercise, you will add a shade to a slide background and then change the background from shaded to textured.

USE the *Background* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptAdjusting* folder.

OPEN the *Background* presentation.

1. On the **Design** tab, in the **Background** group, click the **Background Styles** button.
2. In the **Background** gallery, point to each style in turn to see a live preview of its effects.
3. Click the last thumbnail in the second row (**Style 8**).
4. Click the **Background Styles** button again, and then click **Format Background** at the bottom of the gallery.

   The Format Background dialog box opens.

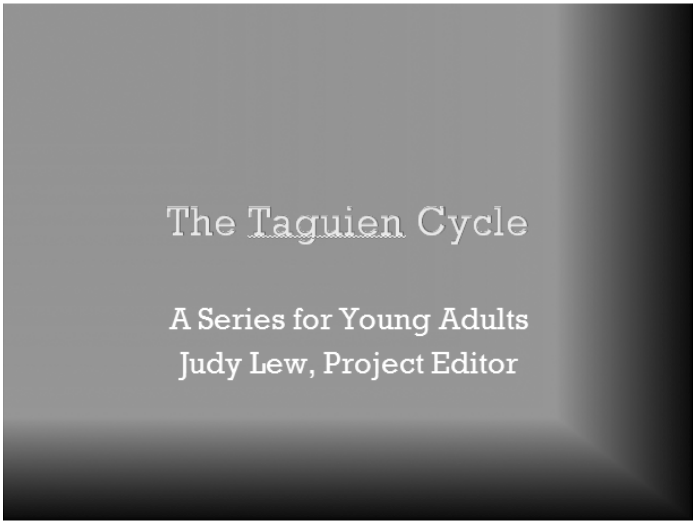


Tip Clicking the Preset Colors button displays a gallery of professionally designed color gradients, which range from one color to sets of several colors.

5. Click the **Type** arrow, and then in the list, click **Rectangular**.

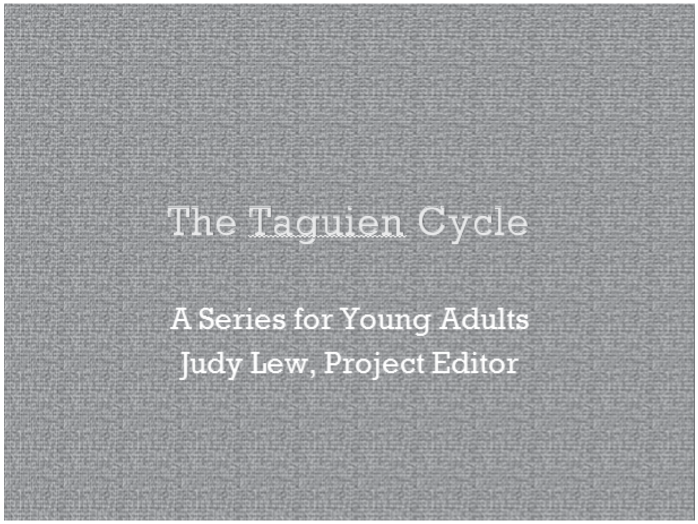
6. Click the **Direction** button, and at the right end of the gallery, click the **From Corner** effect.
7. In the **Gradient stops** area, drag the **Stop position** slider to the right until the adjacent setting is **80%**.
8. Click the **Color** button, and then in the **Theme Colors** palette, click the green color in the top row.
9. Click **Close**.

   PowerPoint applies the shaded background only to the current slide.



10. Click the **Background Styles** button again, and then click **Format Background**.
11. In the **Format Background** dialog box, click **Picture or texture fill**.
12. Click the **Texture** button, and then in the gallery, click **Denim**.
13. Click the **Apply to All** button, and then click **Close**.

    PowerPoint applies the textured background to the current slide and all the other slides in the presentation.

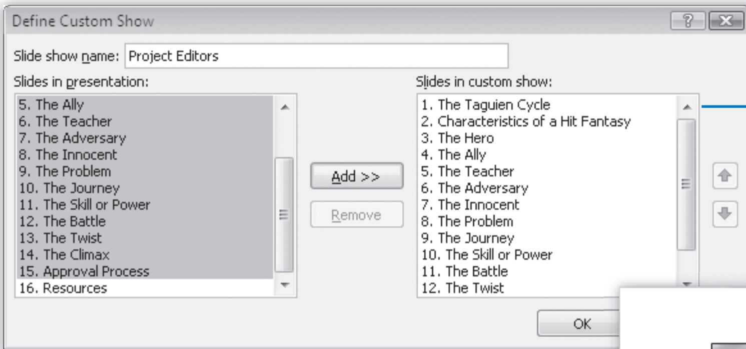


CLOSE the *Background* presentation without saving your changes. If you are not continuing directly to the next chapter, exit PowerPoint.

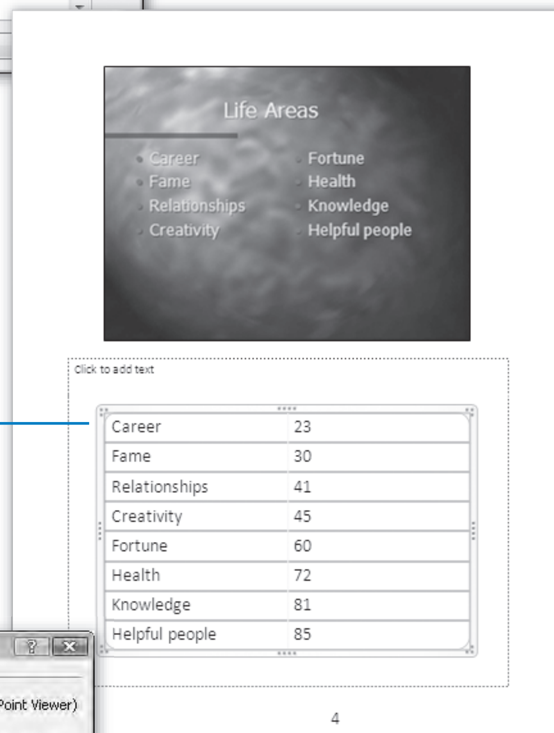
Key Points

- After you create a slide, you can easily modify its layout.
- If you manually change the layout of a slide, you can restore the default layout.
- You can change the order of slides by rearranging them on the Slides tab or in Slide Sorter view.
- You can easily change the look and feel of a presentation by switching from one predefined theme to another. If you like all the elements of a theme except its colors, you can apply a different color scheme.
- You can apply a color scheme to one or all the slides in a presentation.
- You can create your own color schemes, and you can add colors that aren't part of the current scheme to selected parts of a slide.
- To dress up the background of one slide or of all the slides in a presentation, you can apply a solid color, a color gradient, a texture, or a picture.

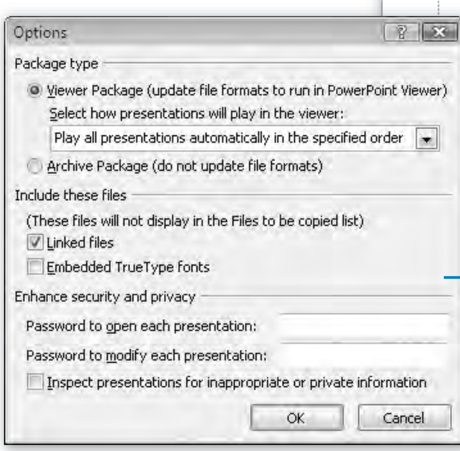
Chapter at a Glance



Adapt a presentation for different audiences, **page 440**



Prepare speaker notes and handouts, **page 448**



Prepare a presentation for travel, **page 453**

16 Delivering a Presentation Electronically

In this chapter, you will learn to:

- ✔ Adapt a presentation for different audiences.
- ✔ Rehearse a presentation.
- ✔ Prepare speaker notes and handouts.
- ✔ Prepare a presentation for travel.
- ✔ Show a presentation.

The goal of all the effort involved in creating a presentation is to be able to effectively deliver it to a specific audience. With Microsoft Office PowerPoint 2007, you can easily deliver a presentation from your computer as an electronic slide show. In Slide Show view, instead of the slide appearing in a presentation window within the PowerPoint program window, the slide occupies the entire screen.

Before you can deliver a presentation, you need to perform several tasks to ensure its success. You can hide individual slides to adapt the presentation for a specific audience, or if you know that you will be giving variations of the same presentation to different audiences, you can save a set of slides as a separate presentation that you will show only if appropriate. You can tailor the speed at which slides appear, to appropriately fit your presentation to the allotted time. To support your delivery of the presentation, you can prepare speaker notes, and to help your audience retain your message, you can prepare handouts. Finally, if you are delivering the presentation at a remote location, you will want to use the Package For CD feature to ensure that you take all the necessary files with you.

When you deliver a slide show from your computer, you navigate through slides by clicking the mouse button or by pressing the arrow keys. You can move forward and backward one slide at a time, and you can jump to specific slides as the needs of your

audience dictate. During the slide show, you can mark up slides with an on-screen pen or highlighter to emphasize a point.

In this chapter, you will adapt a presentation for two audiences, first by creating a custom slide show, and then by hiding a slide. You will apply slide timings to a presentation, rehearse it, and have PowerPoint set the timings for you. You will enter speaker notes in both the Notes pane and in Notes Page view, customize the Notes master, and print speaker notes and handouts. Then you will save a presentation package on a CD and run it from the CD by using the presentation viewer that comes with PowerPoint. Finally, you will deliver a presentation and mark up slides while showing them.

See Also **Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.**

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Adapting a Presentation for Different Audiences

If you plan to deliver variations of the same presentation to different audiences, you should prepare one presentation containing all the slides you are likely to need for all the audiences. Then you can select slides from the presentation that are appropriate for a particular audience and group them as a ***custom slide show***. When you need to deliver the presentation for that audience, you open the main presentation and show the subset of slides by choosing the custom slide show from a list.

For example, suppose you need to pitch an idea for a new product or service to both a team of project managers and a company's executive team. Many of the slides would be the same for both groups, but the presentation to the executive team would include more in-depth competitive and financial analysis. You would develop the executive team's presentation first and then create a custom slide show for the project managers by using a subset of the slides in the executive presentation.

Sometimes you might want to be able to make an on-the-spot decision during a presentation about whether to display a particular slide. You can give yourself this flexibility by hiding the slide so that you can skip over it if its information doesn't seem useful to a particular audience. If you decide to include the slide's information in the presentation, you can display it by pressing the letter H or by using the Go To Slide command.

In this exercise, you will select slides from an existing presentation to create a custom slide show for a different audience. You will also hide a slide and then see how to display it when necessary.

USE the *Adapting* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptDelivering* folder.

BE SURE TO start PowerPoint before beginning this exercise.

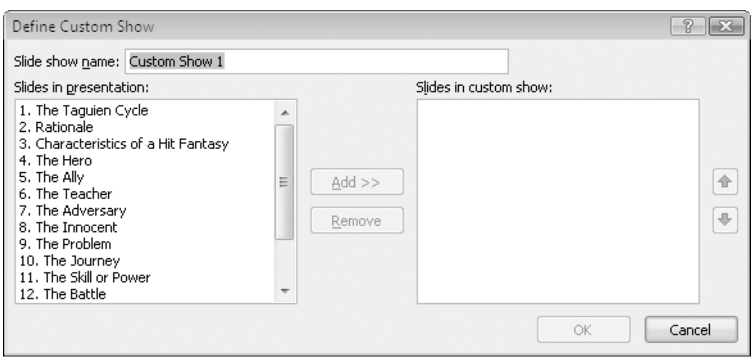
OPEN the *Adapting* presentation.

1. On the **Slide Show** tab, in the **Start Slide Show** group, click the **Custom Slide Show** button, and then click **Custom Shows**.

   The Custom Shows dialog box opens.

2. Click **New**.

   The Define Custom Show dialog box opens. The default custom show name is selected in the Slide Show Name box.



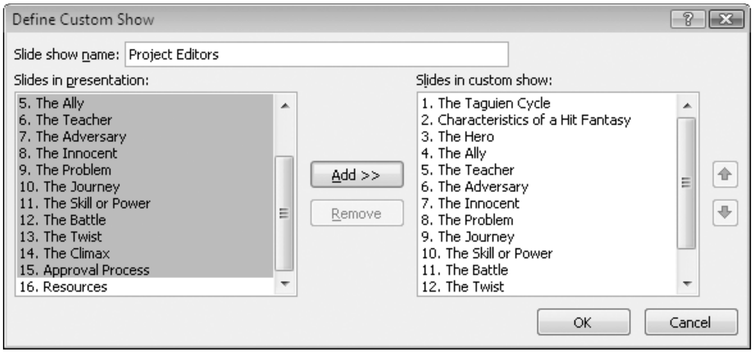
3. In the **Slide show name** box, type Project Editors.

4. In the **Slides in presentation** list, click **1. The Taguien Cycle**, and then click **Add**.

   Slide 1 appears as Slide 1 in the Slides In Custom Show box on the right.

5. In the **Slides in presentation** list, click **3. Characteristics of a Hit Fantasy**, scroll the list, hold down the Shift key, and click **15. Approval Process**. Then click **Add**.

The slides appear in sequential order in the Slides In Custom Show box on the right.



6. Click **OK**.
7. In the **Custom Shows** dialog box, click **Show** to start the custom slide show.
8. Click the mouse button to advance through all the slides, including the blank one at the end of the show.
9. In Normal view, on the **Slide Show** tab, in the **Start Slide Show** group, click the **Custom Slide Show** button.

   Project Editors has been added to the list. Clicking this option will run the custom slide show.
10. In the list, click **Custom Shows**.
11. In the **Custom Shows** dialog box, verify that **Project Editors** is selected, and then click **Edit**.

    The Define Custom Show dialog box opens.
12. At the bottom of the **Slides in custom show** box, click **14. Approval Process**, and then click **Remove**.

    PowerPoint removes the slide from the custom slide show, but not from the main presentation.

> **Tip** To change the order of the list, select a slide and click the Up arrow or the Down arrow to the right of the Slides In Custom Show box.

13. Click **OK** to close the **Define Custom Show** dialog box, and then click **Close** to close the **Custom Shows** dialog box.
14. In the **Overview** pane, scroll to the bottom of the **Slides** tab, right-click **Slide 12**, and then click **Hide Slide**.

On the Slides tab, PowerPoint puts a box with a diagonal line around the number 12, and dims the slide contents to indicate that it is hidden.

Tip In Slide Sorter view, you can select a slide and then on the Slide Show tab, in the Set Up group, click the Hide Slide button.


Slide Show

15. Display **Slide 11**, and on the **View** toolbar, click the **Slide Show** button. Then press Space to move to the next slide.

    Because Slide 12 is hidden, PowerPoint skips from Slide 11 to Slide 13.

16. Press the ← key to move back to Slide 11.

17. Right-click anywhere on the screen, point to **Go to Slide**, and then click **(12) The Battle**.

    The number is in parentheses because the slide is hidden. When you click it, the hidden slide appears in Slide Show view.

18. Press Esc to end the slide show.

CLOSE the *Adapting* presentation without saving your changes.

Rehearsing a Presentation

When delivering a slide show, you can move from slide to slide in the following ways:

- **Manually.** You control when you move by clicking the mouse button, pressing keys, or clicking commands.
- **Automatically.** PowerPoint displays each slide for a predefined length of time and then displays the next slide.

The length of time a slide appears on the screen is controlled by its ***slide timing***. By default, slide timings are divided equally among the animations for each slide. So if a slide has a title and four bullet points that are all animated and you assign a timing of 1 minute to the slide, the five elements will appear at 12-second intervals.

To apply a timing to one slide, to a group of slides, or to an entire presentation, you first select the slides, and then in the Advance Slide area of the Transition To This Slide group on the Animations tab, select the Automatically After check box and enter the number of minutes and/or seconds you want each slide to remain on the screen.

> **Tip** If you are delivering the presentation in Slide Show view and want to prevent PowerPoint from advancing to the slide according to a slide timing, press the letter S on your keyboard, or right-click the current slide and click Pause. To continue the presentation, press the letter S again, or right-click the slide and click Resume.

If you don't know how much time to allow for the slide timings of a presentation, you can rehearse the slide show while PowerPoint automatically tracks and sets the timings for you, reflecting the amount of time you spend on each slide during the rehearsal. During the slide show, PowerPoint displays each slide for the length of time you indicated during the rehearsal. In this way, you can synchronize an automatic slide show with a live narration or demonstration.

In this exercise, you will set the timing for one slide and then apply it to an entire presentation. Then you will rehearse the presentation and have PowerPoint set slide timings according to the amount of time you display each slide during the rehearsal.

> **USE** the *Rehearsing* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptDelivering* folder.
>
> **OPEN** the *Rehearsing* presentation.

1. On the **Animations** tab, in the **Transition to This Slide** group, in the **Advance Slide** area, select the **Automatically After** check box, and then type or select **00:03**.

   Because both check boxes in the Advance Slide area are selected, the slide will advance either after three seconds or when you click the mouse button.


Slide Show

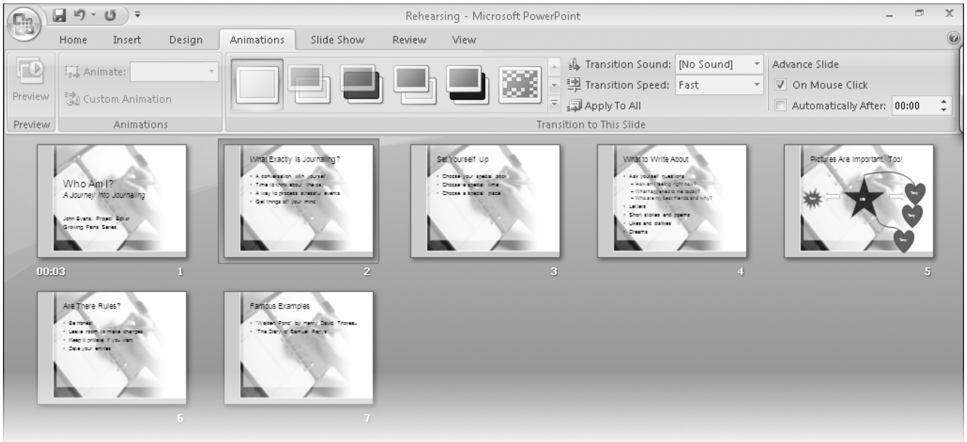
2. On the **View** toolbar, click the **Slide Show** button.

   Slide 1 is displayed for three seconds, and then PowerPoint moves to Slide 2.


Slide Sorter

3. Press Esc to end the show, and then on the **View** toolbar, click the **Slide Sorter** button.

   Below the lower-left corner of Slide 1 is the slide timing you just applied.



4. Click **Slide 1**, and then on the **Animations** tab, in the **Transition to This Slide** group, click the **Apply To All** button.

The slide timing you applied to Slide 1 is now applied to all the slides.

> **Important** When you click Apply To All, all the transition effects applied to the current slide are transferred to the other slides. If you have applied different transitions to different slides, those individually specified transitions are overwritten. So it's a good idea to apply all the effects that you want the slides to have in common first. Then you can select individual slides and customize their effects.

5. Switch to Slide Show view, watch as the slides advance, and then click the mouse button when the black screen is displayed.

6. In the **Advance Slide** area of the **Transition to This Slide** group, clear the **Automatically After** check box, and then click **Apply To All**.

The slide timings disappear from below the slides.

7. With **Slide 1** selected, on the **Slide Show** tab, in the **Set Up** group, click the **Rehearse Timings** button.

The screen switches to Slide Show view, starts the show, and displays the Rehearsal toolbar in the upper-left corner of the screen. A Slide Time counter is timing the length of time Slide 1 remains on the screen.


Next

8. Wait about 10 seconds, and then on the **Rehearsal** toolbar, click the **Next** button.

9. Work your way slowly through the slide show, clicking **Next** to move to the next slide.

Repeat

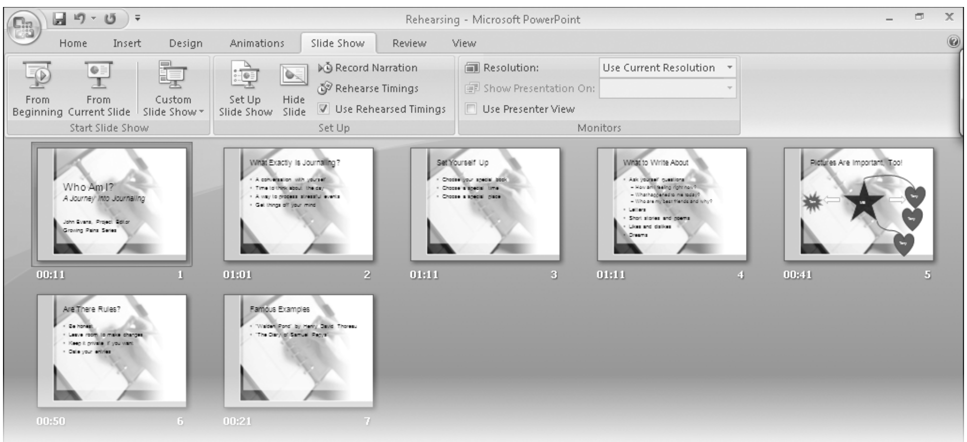
10. If you want to repeat the rehearsal for a particular slide, on the **Rehearsal** toolbar, click the **Repeat** button to reset the slide time for that slide to 0:00:00.

> **Tip** If you want to start the entire rehearsal over again, click the Rehearsal toolbar's Close button, and when a message asks whether you want to keep the existing timings, click No.

When you reach the end of the slide show, a message box displays the elapsed time for the presentation and asks whether you want to apply the recorded slide timings.

11. Click **Yes**.

The screen switches back to Slide Sorter view, where the recorded timings have been added below each slide.



12. Click the **Animations** tab.

The timing for the active slide, Slide 1, appears in the Automatically After box in the Advance Slide area of the Transition To This Slide group.

13. If the **Automatically After** setting is not a whole second, click the setting's Up arrow to adjust the time up to the next whole second.

You can manually adjust the timing of any slide by selecting it and changing the setting in this box.

14. On the **View** toolbar, click the **Slide Show** button.

The slides advance according to the recorded timings.

15. Press Esc at any time to stop the slide show.

CLOSE the *Rehearsing* presentation without saving your changes.

Creating a Self-Running Presentation

When slide timings have been applied to a PowerPoint presentation, the presentation can be set up to run automatically, either once or continuously. For example, you might want to set up a self-running presentation for a product demonstration in a store.

To set up a self-running presentation:

1. Open the presentation, and then on the **Slide Show** tab, in the **Set Up** group, click the **Set Up Slide Show** button.

   The Set Up Show dialog box opens.

2. In the **Show type** area, click **Browsed at a kiosk (full screen)**.

   When you click this option, the Loop Continuously Until 'Esc' check box in the Show Options area becomes unavailable so that you cannot clear it. Any narration or animation attached to the presentation will play with the presentation unless you select the Show Without Narration or Show Without Animation check box.

3. Click **OK**.
4. To test the show, display **Slide 1**, and on the **View** toolbar, click the **Slide Show** button.

   The presentation runs continuously, using its transitions, animations, and slide timings.

5. Press Esc to stop the slide show, and then save the presentation with a different name.

When you are ready to run the presentation, you can navigate to the folder where it is stored, and double-click it. The slide show opens in the view in which it was saved. Switch to Slide Show view to start the presentation. You can press Esc to stop the slide show at any time.

Preparing Speaker Notes and Handouts

If you will be delivering your presentation before a live audience, you will probably need some speaker notes to guide you. Each slide in a PowerPoint presentation has a corresponding notes page. As you create each slide, you can enter notes that relate to the slide's content by simply clicking the Notes pane and typing. If you want to include something other than text in your speaker notes, you must switch to Notes Page view by clicking the Notes Page button in the Presentation Views group on the View tab. When your notes are complete, you can print them so that they are readily available to guide the presentation.

As a courtesy for your audience, you might want to supply handouts showing the presentation's slides so that people can take notes. You don't need to do anything special to create handouts. Printing them requires a few simple decisions, such as how many slides you want to appear on each page.

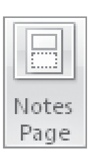
Notes and handouts have their own masters, and you can customize them by using the same techniques you use to customize slide masters. Usually, you will find that the default masters are more than adequate, but if you want to make changes, you click Notes Master or Handout Master in the Presentation Views group on the View tab to display the respective masters.

In this exercise, you will enter speaker notes for a couple of slides in the Notes pane. You will then switch to Notes Page view, insert a graphic in one note and a table in another, customize the Notes master, and then print speaker notes and handouts.

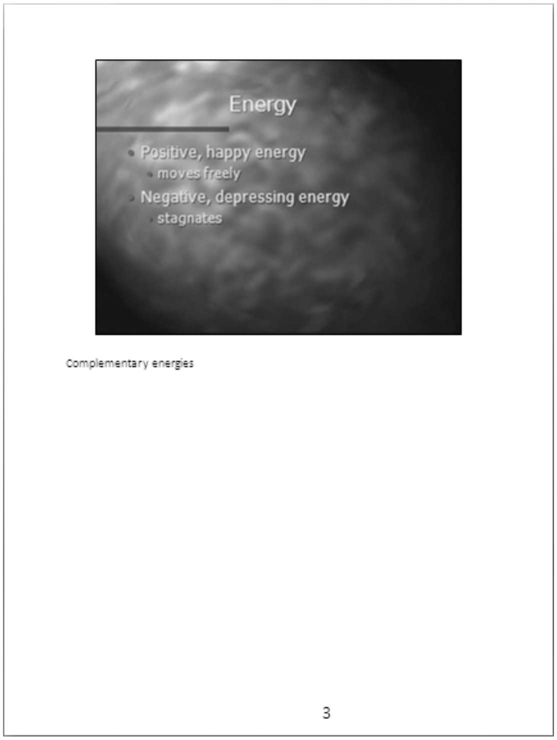
USE the *NotesHandouts* presentation and the *YinYang* graphic. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\PptDelivering* folder.

OPEN the *NotesHandouts* presentation.

1. With **Slide 1** selected, in the **Notes** pane, click the **Click to add notes** placeholder, type **Welcome and introductions**, and then press Enter.
2. Type **Logistics**, press Enter, and then type **Establish knowledge level**.
3. Display **Slide 2**, and in the **Notes** pane, type **Talk about the main concepts**.
4. Display **Slide 3**, and in the **Notes** pane, type **Complementary energies**, and then press Enter twice.
5. On the **View** tab, in the **Presentation Views** group, click the **Notes Page** button.



   Slide 3 is displayed in Notes Page view, with the view percentage set so that the entire page will fit in the window.



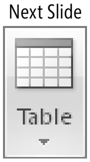
> **Tip** If you have trouble seeing the notes at this view percentage, click the Zoom button in the Zoom group on the View tab. Then when the Zoom dialog box opens, select or type a larger percentage, and click OK.

6. On the **Insert** tab, in the **Illustrations** group, click the **Picture** button.
7. In the **Insert Picture** dialog box, navigate to your *Documents\Microsoft Press\2007OfficeSBS\PptDelivering* folder, and then double-click the *YinYang* graphic.
8. Drag the image down below the note you typed in step 4.

   The picture is visible in Notes Page view.

Next Slide

9. At the bottom of the scroll bar, click the **Next Slide** button to move to Slide 4.

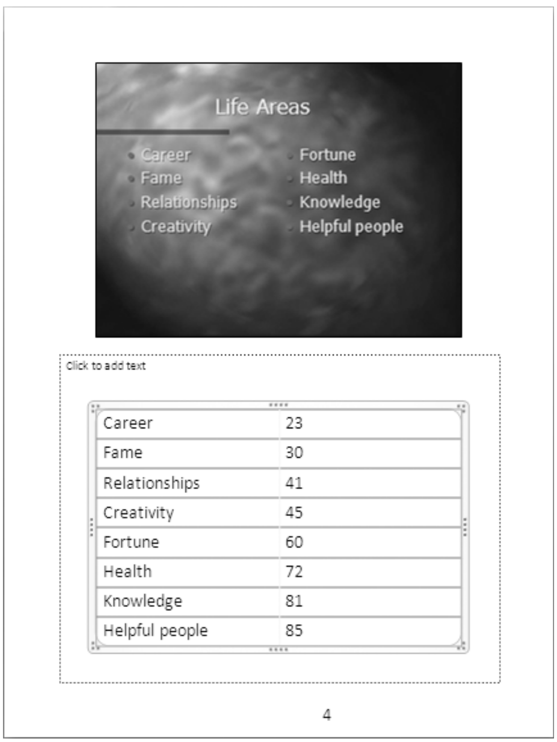


10. On the **Insert** tab, in the **Tables** group, click the **Table** button, and then drag to create a table that is two columns wide and eight rows high.
11. Drag the table by its border down into the notes placeholder, and then on the **Design** contextual tab in the **Table Style Options** group, clear the **Header Row** and **Banded Rows** check boxes.

12. Enter the following information, pressing Tab to move from cell to cell and from row to row:

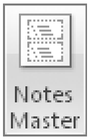
Career	23
Fame	30
Relationships	41
Creativity	45
Fortune	60
Health	72
Knowledge	81
Helpful people	85

The speaker notes now include the page numbers in a reference work where you can find additional information if required during the presentation.



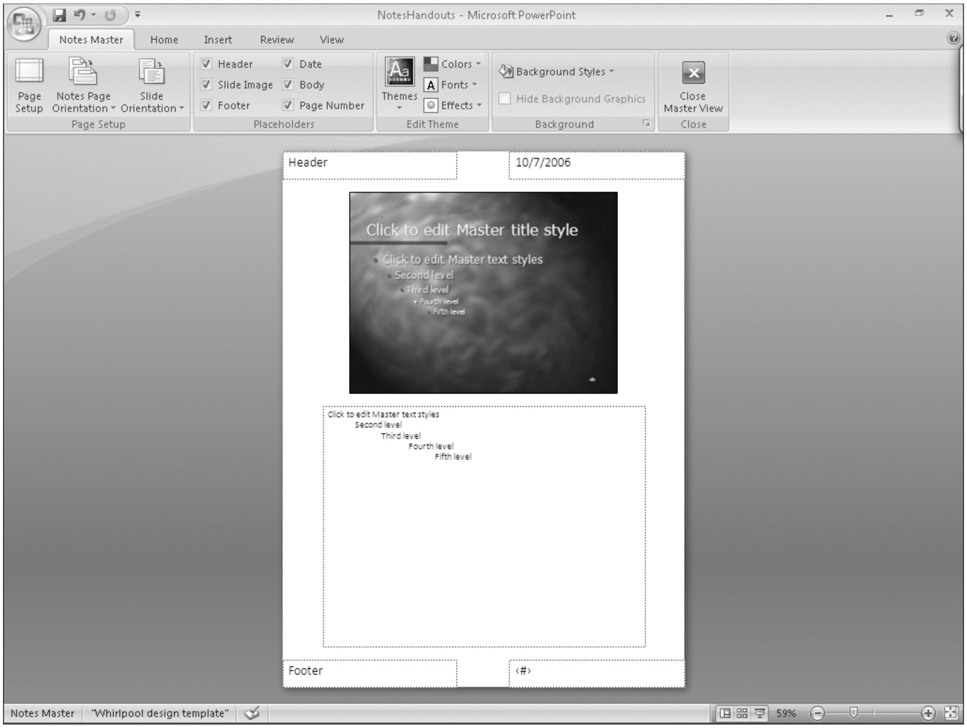
13. On the **View** tab, in the **Presentation Views** group, click the **Normal** button, and then drag the splitter bar above the Notes pane up to expand it.

The table is not visible in Normal view.



14. Drag the splitter bar down again. Then on the **View** tab, in the **Presentation Views** group, click the **Notes Master** button.

The Notes Master appears, and the Notes Master tab is added to the Ribbon.



15. In the upper-left corner of the page, click the header placeholder, and then type **Feng Shui**.

16. In the lower-left corner of the page, click the footer placeholder, and then type **Beginners' Class**.


Normal

17. On the **View** toolbar, click the **Normal** button to return to Normal view.


Microsoft Office Button

18. Click the **Microsoft Office Button**, and then click **Print**.

The Print dialog box opens.

19. Click the **Print what** arrow, click **Notes Pages** in the list, and then click **OK**.

You now have a copy of the speaker notes to refer to during the presentation.

20. Display the **Print** dialog box again, and then change the **Print what** setting to **Handouts**.

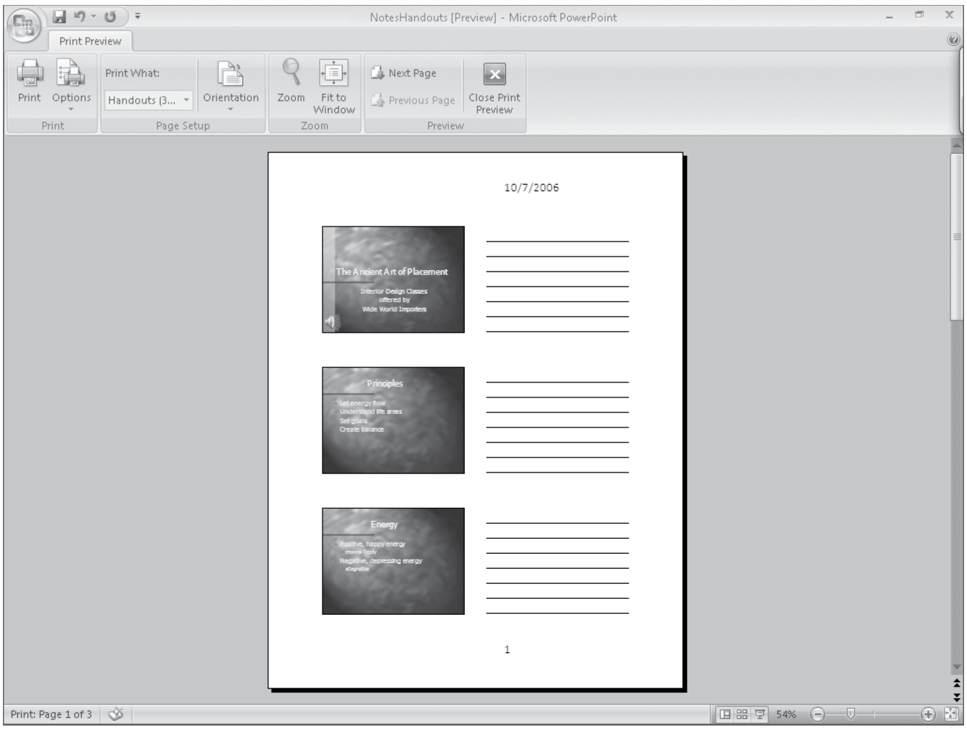
You can print audience handouts in six formats: one, two, three, four, six, or nine slides per page. The default, six, is set on the Handout master, but you can change it in the Print dialog box.

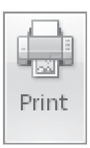
21. In the **Handouts** area, click the **Slides per page** arrow, and in the list, click **3**.

    When you print three slides per page, PowerPoint adds lines for notes to the right of each slide, as shown in the diagram on the right side of the dialog box.

22. In the lower-left corner of the dialog box, click **Preview**.

    The first page of the handouts appears in Print Preview.





23. On the **Print Preview** tab, in the **Print** group, click the **Print** button, and then click **OK**.

24. Return to Normal view.

CLOSE the *NotesHandouts* presentation without saving your changes.

Preparing a Presentation for Travel

When you develop a presentation on the computer from which you will be delivering it, you will have all the fonts, linked objects, and other components of the presentation available when the lights go down and you launch your first slide. However, if you will deliver your presentation from a different computer, you need to make sure the fonts, linked objects, and any other necessary items are available.

With PowerPoint 2007, you can use the ***Package for CD*** feature to help you gather all the presentation components and save them to a CD or other type of removable media so that they can be transported to a different computer. Linked files are included in the presentation package by default. TrueType fonts are stored with the presentation if you click Embedded TrueType Fonts while creating the package. (When you include embedded fonts, the file size increases significantly.)

> **Tip** You can embed fonts when you package a presentation, or you can do it when you first save the presentation. In the Save As dialog box, click Tools, click Save Options, and on the Save page, select the Embed Fonts In The File check box. Then click Embed Only The Characters Used In The Presentation to embed only the characters in the font set that are actually used, or click Embed All Characters to embed the entire font set.

When you use Package For CD, by default the presentation will be set up to run automatically in the ***Microsoft Office PowerPoint Viewer***. You can then send the CD containing the presentation package to people who do not have PowerPoint installed on their computers, and they will be able to view the presentation in the PowerPoint Viewer.

In this exercise, you will use Package For CD to create a presentation package on a CD. You will then run the presentation using the PowerPoint Viewer.

> **USE** the *Travel* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptDelivering* folder.
>
> **BE SURE TO** have a blank CD available. If your computer does not have a CD burner, you can follow along with the exercise but you will not be able to complete steps 8 through 16.
>
> **OPEN** the *Travel* presentation.


MIcrosoft Office Button

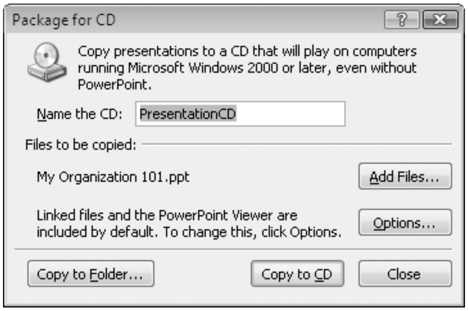
1. Click the **Microsoft Office Button**, click **Save As**, and then save the current presentation in the *PptDelivering* folder, with the name **My Organization 101**.

2. Click the **Microsoft Office Button**, point to **Publish**, and then click **Package for CD**.

   A message box tells you that your file will be converted to the PowerPoint 97-2003 format so that it is compatible with the PowerPoint Viewer.

3. Click **OK**.

   The Package For CD dialog box opens.

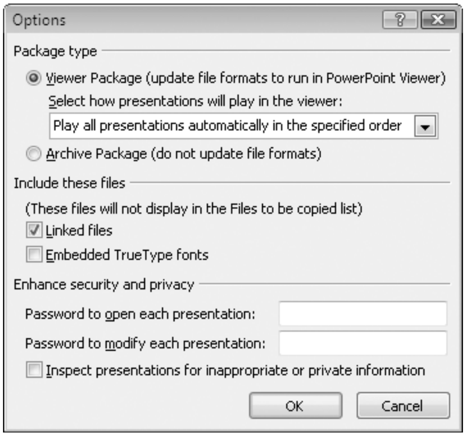


4. In the **Name the CD** box, type **Organization**.

   The open presentation, its linked files, and the PowerPoint Viewer will be included in the presentation package by default, but you need to specifically include embedded fonts.

5. Click **Options**.

   The Options dialog box opens.



6. In the **Package type** area, leave **Viewer Package** selected, but click the **Select how presentations will play in the viewer** arrow, and then in the list, click **Let the user select which presentation to view**.

Clicking Viewer Package includes the PowerPoint Viewer. If you click Archive Package, the package contains only the presentation.

7. In the **Include these files** area, select the **Embedded TrueType fonts** check box, and then click **OK**.

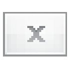
> **Important** Be sure to select the Embedded TrueType Fonts check box if a presentation includes fonts that don't come with the version of Windows running on the presentation computer or the 2007 Microsoft Office system programs. Then the presentation will look the same on a computer on which the fonts aren't installed as it does on your computer.

8. Insert a blank CD in your CD burner, and then click **Copy to CD**.

   If your computer does not have a CD burner, click Copy To Folder instead, and then select the folder in which you want to store the package.

> **Tip** PowerPoint 2007 does not support the direct burning of content to a DVD. If you prefer to burn to a DVD rather than a CD, first copy your presentation to a folder on your computer, and then use DVD-burning software to create the DVD.

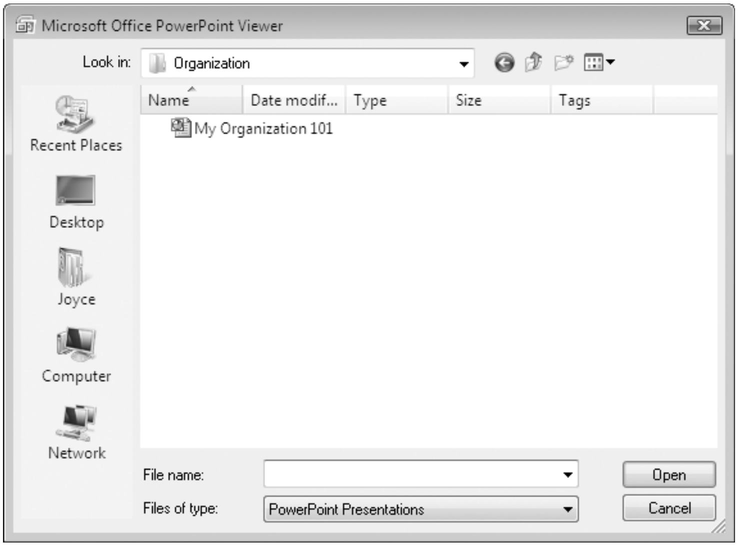
9. When PowerPoint asks you to verify that you want to include linked content, click **Yes**.
10. When you see a message that the copy operation was successful, click **No** to indicate that you don't want to copy the same package to another CD.
11. Click **Close** to close the **Package for CD** dialog box.


Close

12. At the right end of the title bar, click the **Close** button to close the presentation and exit PowerPoint.
13. Remove the CD from your CD burner, and then re-insert it.

> **Troubleshooting** If you are running the package from your computer, navigate to the folder where the package is stored, and double-click the *Organization* folder (the name you assigned in step 4). Then double-click PPTVIEW to start the Presentation Viewer.

After a few seconds, the PowerPoint Viewer starts. The first time you run this program, you need to click Accept to accept the terms of the program's license agreement. Then a dialog box opens in which you can select the presentation you want to run.



14. In the list of file and folder names, double-click **My Organization 101**.

    The PowerPoint Viewer displays the presentation's title slide.

15. Click the mouse button to advance through the slides in the PowerPoint Viewer, and then press the Esc key to end the presentation.

    The PowerPoint Viewer closes.

16. Close the **Microsoft Office PowerPoint Viewer** dialog box.

Showing a Presentation

To start a slide show from Normal or Slide Sorter view, you click the Slide Show button to display the current slide full screen. Then the simplest way to move linearly from one slide to the next is to click the mouse button without moving the mouse. But you can also move around by using the keyboard in the following ways:

- To move to the next slide, press the Spacebar, the Down Arrow key, or the Right Arrow key.
- To move to the previous slide, press the Page Up key or the Left Arrow key.
- To end the presentation, press the Esc key.

If you need to move to a slide other than the next one or the previous one, you can move the mouse pointer to display an inconspicuous toolbar in the lower-left corner of the slide. You can use this toolbar in the following ways:

- To move to the next slide, click the Next button.
- To move to the previous slide, click the Previous button.
- To jump to a slide out of sequence (even if it is hidden), click the Navigation button, click Go To Slide, and then click the slide.
- To display the slides in a custom slide show, click the Navigation button, click Custom Show, and then click the show.
- To display a list of keyboard shortcuts for carrying out slide show tasks click the Navigation button, and then click Help. For example, you can press the H key to show the next hidden slide, press the E key to erase pen annotations, or press the A key to show the pointer arrow.
- To end the presentation, click the Navigation button, and then click End Show.

> **Tip** You can also display the Navigation button's menu by right-clicking the slide.

During a presentation, you can reinforce your message by drawing on the slides with an electronic "pen" or changing the background behind text with a highlighter. You simply click the Pen button on the toolbar that appears when you move the mouse, click the tool you want, and then begin drawing or highlighting. You can change the pen or highlighter color to make it stand out on the slide by clicking the Pen button, clicking Ink Color, and then selecting the color you want.

In this exercise, you will move around in various ways while delivering a presentation. You'll also use a pen tool to mark up one slide, change the color, and mark up another.

> **USE** the *Showing* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PptDelivering* folder.
>
> **OPEN** the *Showing* presentation.


Slide Show

1. With **Slide 1** selected in Normal view, on the **View** toolbar, click the **Slide Show** button.

   The background of the first slide is displayed.

2. Click anywhere on the screen, and then click again.

   First the title moves onto the slide from the top, and then the subtitle moves onto the slide from the bottom.

3. Click the mouse button to advance to Slide 2.

   The slide contents move in from the right.

4. Press the ← key to display the previous slide, and then press the → key to display the next slide.
5. Move the mouse.

   The pointer appears on the screen, and the shadow toolbar appears in the lower-left corner.

   > **Troubleshooting** If the pop-up toolbar doesn't appear, press the Esc key to end the slide show. Then click the Microsoft Office Button, click PowerPoint Options, click Advanced, and in the Slide Show section, select the Show Popup Toolbar check box, and click OK.


Next

6. On the toolbar, click the **Next** button (the button at the right end of the shadow toolbar) to display Slide 3.
7. Right-click anywhere on the screen, and then click **Previous** to redisplay Slide 2.
8. Right-click anywhere on the screen, point to **Go to Slide**, and then in the list of slide names, click **7 Pulling It All Together**.


Navigation

9. Display the toolbar, click the **Navigation** button, and then click **Next** to display Slide 8.
10. Use various navigation methods to move around the slide show until you are comfortable moving around.
11. Right-click anywhere on the screen, and then click **End Show**.

    Slide 8 appears in Normal view.

    > **Tip** If you click all the way through to the end of the presentation, PowerPoint displays a black screen to indicate that the next click will return you to the previous view. If you do not want the black screen to appear at the end of a presentation, click the Microsoft Office Button, click PowerPoint Options, and click Advanced. Then in the Slide Show area, clear the End With Black Slide check box, and click OK. Then clicking while the last slide is displayed will return you to the previous view.

12. Display **Slide 5**, and switch to Slide Show view.
13. Right-click anywhere on the screen, point to **Pointer Options**, and click **Felt Tip Pen**.

    The pointer changes to resemble the tip of a felt tip pen.

    > **Important** When the pen tool is active in Slide Show view, clicking the mouse does not advance the slide show to the next slide. You need to switch back to the regular pointer to use the mouse to advance the slide.

14. Draw a line below the word *Colorizing* in the title.

15. Right-click the screen, point to **Pointer Options**, and then click **Erase All Ink on Slide**.

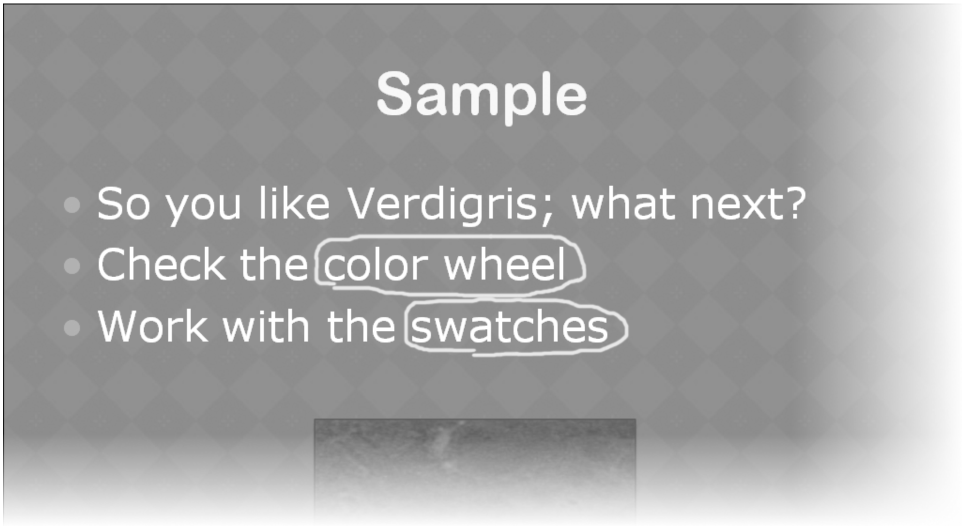
    The line is erased.

16. Press Space to move to the next slide.


Pen

17. Display the toolbar, click the **Pen** button, point to **Ink Color**, and then in the palette, click a light purple color.

18. Draw circles around *color wheel* and *swatches*.



19. Right-click anywhere on the screen, point to **Pointer Options**, and then click **Arrow**.

    The pen tool changes back to the regular pointer, and you can now click the mouse button to advance to the next slide.

20. Press Esc to stop the slide show.

    A message asks whether you want to keep your ink annotations.

21. Click **Discard**.

    Slide 6 appears in Normal view.

CLOSE the *Showing* presentation without saving your changes, and exit PowerPoint.

Using Two Monitors

If your computer can support two monitors, or if you will be presenting a slide show from your computer through an overhead projector, you might want to check out Presenter view. In this view, you can control the slide show on one monitor while the audience sees the presentation in Slide Show view on the other monitor or the projector screen.

To deliver a slide show on one monitor and use Presenter view on another:

1. Open the PowerPoint presentation you want to set up.
2. On the **Slide Show** tab, in the **Set Up** group, click **Set Up Slide Show**.

   The Set Up Show dialog box opens.
3. In the **Multiple monitors** area, click the **Display slide show on** arrow, and then in the list, click the name of the monitor you want to use to deliver the presentation.

   The slide show will run full-screen on the specified monitor.
4. In the **Multiple monitors** area, select the **Show Presenter View** check box, and then click **OK**.
5. Switch to Slide Show view to start the slide show on the specified monitor.
6. On the other monitor, use the Presenter view navigation tools to control the presentation.

   You can see details about what slide or bullet point is coming next, see your speaker notes, jump directly to any slide, black out the screen during a pause in the presentation, and keep track of the time.

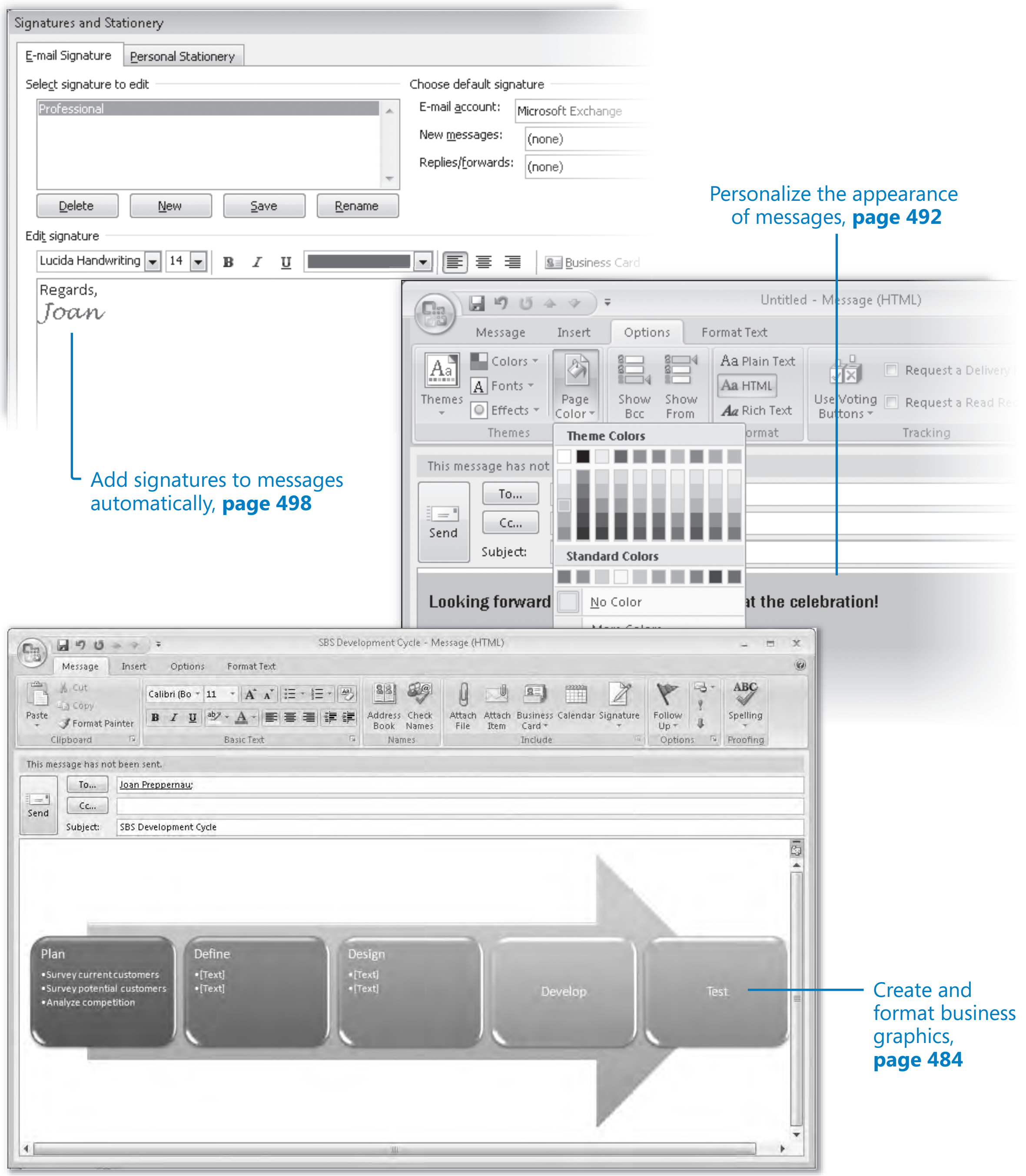
Key Points

- When you don't want to include all the slides in a presentation for a particular audience, you can use a subset of the slides to create a custom slide show. You can also hide slides and then display them only if appropriate.
- You can assign timings to slides manually, or you can rehearse the presentation and record the slide timings from the rehearsal. The presentation automatically advances from one slide to the next have the specified time has elapsed.
- You can easily create speaker notes to ensure a smooth delivery or print handouts to ensure that your audience can easily follow along with your presentation.
- To run the presentation on a computer other than the one you developed the presentation on, you can create a presentation package. Including the PowerPoint Viewer in the package enables the presentation can run on a computer on which PowerPoint is not installed.
- Knowing how to use all the toolbar buttons, commands, and keyboard shortcuts to navigate in Slide Show view will ensure a smoother presentation delivery.
- To emphasize a point, you can mark up slides during a slide show by using different pen tools and different colors. You can save or discard these annotations.

Part V

Microsoft Office Outlook 2007

Chapter at a Glance



Personalize the appearance of messages, **page 492**

Add signatures to messages automatically, **page 498**

Create and format business graphics, **page 484**

17 Sending E-Mail Messages

In this chapter, you will learn to:

- ✔ Work in the message window.
- ✔ Create and send messages.
- ✔ Attach files to messages.
- ✔ Create and format business graphics.
- ✔ Personalize the appearance of messages.
- ✔ Add signatures to messages automatically.

Although Microsoft Office Outlook 2007 includes useful components for managing your calendar, contacts, tasks, and notes, the primary reason most people use Outlook is to send and receive e-mail messages. Over the past decade, ***e-mail*** (short for *electronic mail*) has become an accepted and even required form of business communication. And of course, many people use e-mail to keep in touch with friends and family, either from work or from home. Outlook makes it easy to connect to multiple e-mail accounts, either on a business network or over the Internet, and provides all the tools you need to send, respond to, organize, filter, sort, find, and otherwise manage e-mail messages.

> **Tip** In this chapter and throughout this part of the book, for expediency's sake, we might refer to e-mail messages simply as *messages*.

When sending messages from Outlook, you can:

- Include attachments such as documents, spreadsheets, or business graphics.
- Personalize your messages by using colors, fonts, backgrounds, electronic signatures, and electronic business cards.
- Set message options such as voting buttons, importance, sensitivity, and reminders.
- Request electronic receipts when a message is delivered to the recipient's mailbox or opened by the recipient.

In this chapter, you will look at elements of the item window interface, create and send messages, learn various ways of addressing messages to recipients, and practice sending messages with and without attachments. Then you will create and format a business graphic using the exciting new SmartArt feature provided in Outlook as well as in Microsoft Office PowerPoint 2007 and Microsoft Office Word 2007. Finally, you will experiment with the various ways you can personalize a message, including changing the font and background and adding a signature.

> **Important** You will use the messages you create in this chapter as practice files for exercises in later chapters of this book.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the begining of this book.

> **Important** Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

> **Troubleshooting** Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Working in the Message Window

Outlook displays e-mail messages in the Mail module. When you create or respond to an e-mail message, it opens in a ***message window***. The message window has its own set of commands separate from those in the Outlook program window. You can format and modify outgoing e-mail messages by using the message window commands.

Commands related to managing messages (such as saving, printing, securing, and sharing a message) are available from the Office menu.

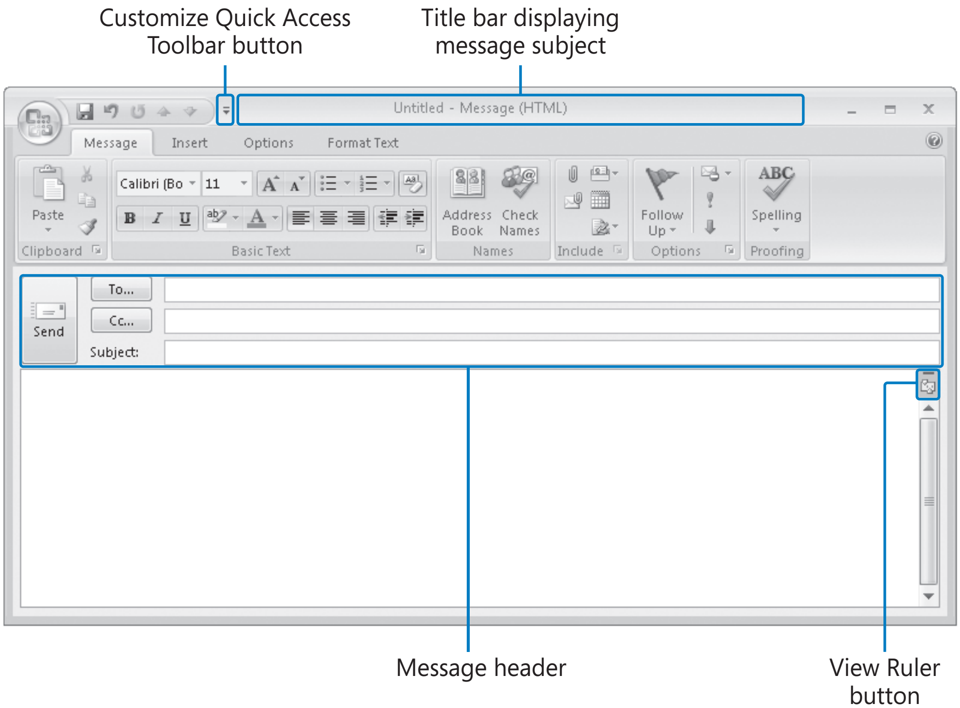
In this exercise, you will take a tour of the message item window. There are no practice files for this exercise.

BE SURE TO start Outlook and display the Inbox before beginning this exercise.

New Mail Message

1. On the **Standard** toolbar, click the **New Mail Message** button.

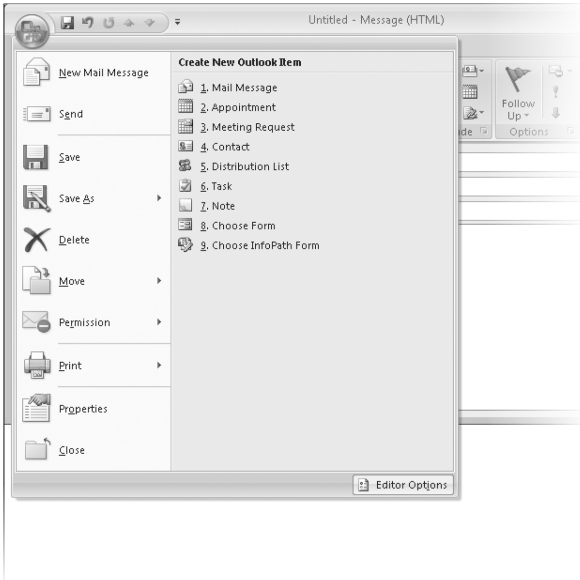
   An untitled message window opens.



Important Depending on your screen resolution and the size of the message window that opens, you might see more or fewer buttons in each of the groups, or the buttons you see might be represented by larger or smaller icons than those shown in this book. Experiment with the size of the message window to understand the effect on the appearance of the command interface tabs.

Microsoft Office Button

2. In the upper-left corner of the message window, click the **Microsoft Office Button** to display the **Office** menu.



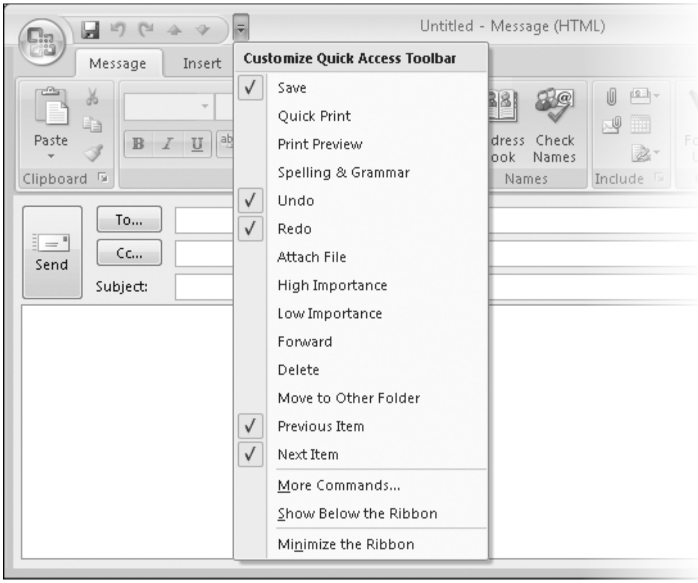
Notice that although you are working in the message window, you can create any type of Outlook item from the Office menu.

3. Click away from the **Office** menu to close it.

Customize Quick Access Toolbar

4. Click the **Customize Quick Access Toolbar** button.

A menu of commonly used commands and customization options appears.

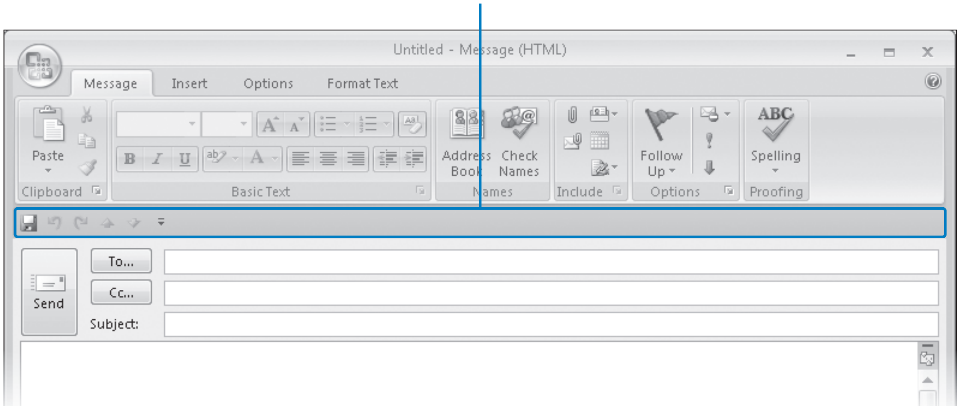


Clicking a command in the first menu section adds it to the Quick Access Toolbar.

5. On the **Customize Quick Access Toolbar** menu, click **Show Below the Ribbon**.

   The Quick Access Toolbar moves to a position between the tabs and the ***message header***. You might find this position useful if you place many additional commands on the Quick Access Toolbar and it crowds the text shown in the message title bar.

Alternate Quick Access Toolbar location



6. On the **Customize Quick Access Toolbar** menu, click **Show Above the Ribbon** to return the Quick Access Toolbar to its original location.

   The message window commands are organized in groups on four tabs:

   - Message
   - Insert
   - Options
   - Format Text

   > **Tip** Depending on what programs you have installed on your computer, tabs and groups other than those described here might also appear on the Ribbon.

   The Message tab is active by default. Buttons representing commands related to creating messages are organized on this tab in six groups:

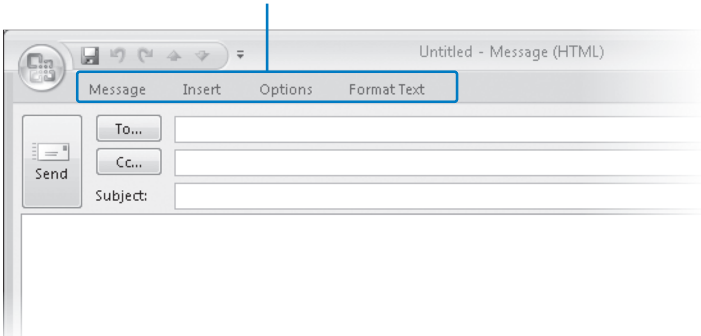
   - Clipboard
   - Basic Text
   - Names
   - Include
   - Options
   - Proofing

   You can compose and send any standard e-mail message by using only the commands available on this tab.

7. Double-click the **Message** tab.

   Double-clicking the active tab hides the Ribbon and provides more space for the message.

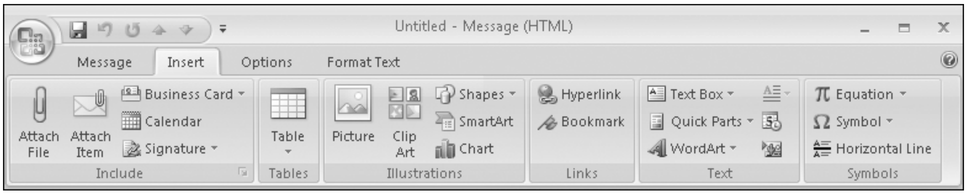
Hidden tabs



8. Click the **Insert** tab.

   The Ribbon reappears, with the Insert tab active.

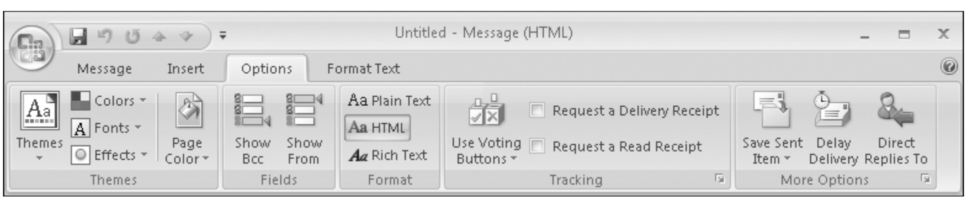
   > **Tip** If you click away from the Ribbon (for example, in the content pane) the Ribbon hides again. This behavior is the default until you again double-click a tab.

   Buttons representing commands related to items you can insert are organized on this tab in six groups:

   - Include
   - Tables
   - Illustrations
   - Links
   - Text
   - Symbols

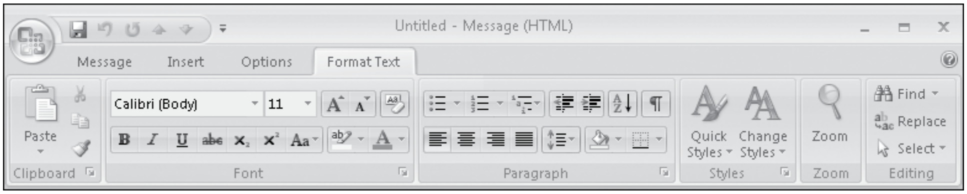
9. Click the **Options** tab.

   Buttons representing commands related to the format, appearance, and actions of messages are organized on this tab in five groups:

   - Themes
   - Fields
   - Format
   - Tracking
   - More Options

10. Click the **Format Text** tab.



Command buttons related to the appearance of message content are organized on this tab in six groups:

- Clipboard
- Font
- Paragraph
- Styles
- Zoom
- Editing

Many of the commands on this tab also appear on the Message tab.

CLOSE the message window.

Outlook Message Formats

Outlook can send and receive e-mail messages in three message formats:

- *Hypertext Markup Language (HTML)* supports paragraph styles (including numbered and bulleted lists), character styles (such as fonts, sizes, colors, weight), and backgrounds (such as colors and pictures). Most (but not all) e-mail programs support the HTML format—those that don't display HTML messages as Plain Text.
- *Outlook Rich Text Format (RTF)* supports more paragraph formatting options than HTML, including borders and shading, but is compatible with only Outlook and Microsoft Exchange Server. Outlook converts RTF messages to HTML when sending them outside of your Exchange network.
- *Plain Text* does not support the formatting features available in HTML and RTF messages, but is supported by all e-mail programs.

Creating and Sending Messages

Regardless of the type of e-mail account you have, as long as you have an Internet connection you can send e-mail messages to people within your organization and around the world. You can personalize your messages by using an individual font style or color, and by inserting your contact information in the form of an e-mail signature or business card. (You can apply other formatting, such as themes and page backgrounds, but these won't always appear to e-mail recipients as you intend them to, and they can make your communications appear less professional.) You can format the text of your message to make it more readable by including headings, lists, or tables; and you can represent information graphically by including charts, pictures, clip art, and other types of graphics. You can attach files to your message and link to other information such as files or Web pages.

See Also For more information about formatting messages, see "Personalizing the Appearance of Messages" later in this chapter.

Addressing Messages

Addressing an e-mail message is as simple as typing the intended recipient's e-mail address into the To box. If you want to send a message to more than one person, indicate a different level of involvement for certain recipients, or include certain people without other recipients knowing, here are some tips.

By default, Outlook requires that you separate multiple e-mail addresses with semicolons. If you prefer, you can instruct Outlook to accept both semicolons and commas. To do this:

1. On the **Tools** menu, click **Options**.
2. In the **Options** dialog box, on the **Preferences** tab, click **E-mail Options**.
3. In the **E-mail Options** dialog box, click **Advanced E-mail Options**.
4. In the **When sending a message** area, select the **Allow comma as address separator** check box, and then click **OK** in each of the three open dialog boxes.

As you type a name or an e-mail address into the To, Cc, or Bcc box, Outlook displays matching addresses in a list below the box. Select a name or e-mail address from the list and then press Tab or Enter to insert the entire name or address in the box.

If your e-mail account is part of an Exchange Server network, you can send messages to another person on the same network by typing only his or her e-mail alias (for example, *joan*)—the at symbol (@) and domain name aren't required.

If a message recipient's address is in your address book, you can type the person's name and Outlook will look for the corresponding e-mail address. (You can either wait for Outlook to validate the name or press Ctrl+K to immediately validate the names and addresses in the address boxes.) By default, Outlook searches your Global Address List and main address book. To have Outlook also search other address books:

1. On the **Tools** menu, click **Address Book**.
2. In the **Address Book** window, on the **Tools** menu, click **Options**.
3. In the **Addressing** dialog box, click **Add**.
4. In the **Add Address List** dialog box, click the address list you want to add, click **Add**, and then click **Close**.
5. In the **Addressing** dialog box, click **OK**, and then close the **Address Book** window.

If the address book does not contain an entry for a name that you type in the To, Cc, or Bcc box of a new message, when you send the message, Outlook prompts you to select an address book entry or provide a full e-mail address.

Sending Courtesy Copies

To send a courtesy copy of a message to a person, enter his or her e-mail address in the Cc box. This is commonly referred to as "CCing" a person. You might CC someone to provide him or her with information but indicate that you don't require his or her involvement in the conversation. To send a message to a person without making it known to other recipients, enter the person's e-mail address in the Bcc box to send a "blind" courtesy copy (also known as "BCCing" a person). Outlook does not display the Bcc field by default. To display the Bcc field:

1. Display a message window.
2. On the **Options** tab, in the **Fields** group, click the **Show Bcc** button.

Addresses entered in the Bcc box can't be seen by other message recipients. They also aren't included in any replies to the original message.

Saving Message Drafts

Until you save or send a message, Outlook maintains a temporary copy of it in your Drafts folder. If you close Outlook (or if a problem causes Outlook to close or your computer to shut down) before you send the message, the ***draft*** retains most or all of your work. When the first draft of a message is saved (either automatically or manually), a banner appears in the message header with the notation "This message has not been sent."

You can save a message draft at any time by clicking the Save button on the Quick Access Toolbar in the message window, or by closing the message window and then clicking Yes in the Microsoft Office Outlook message box asking whether to keep the draft. (If you click No, Outlook deletes the draft.) To restart work on a draft message, display the Mail module, click the Drafts folder in the Navigation Pane, and then double-click the message you want to open.

Troubleshooting Some users running Adobe Acrobat version 6 or 7 might experience problems when creating new messages or responding to messages in Outlook 2007. If you have Adobe Acrobat installed and experience these types of problems, try uninstalling the Adobe Outlook add-ins.

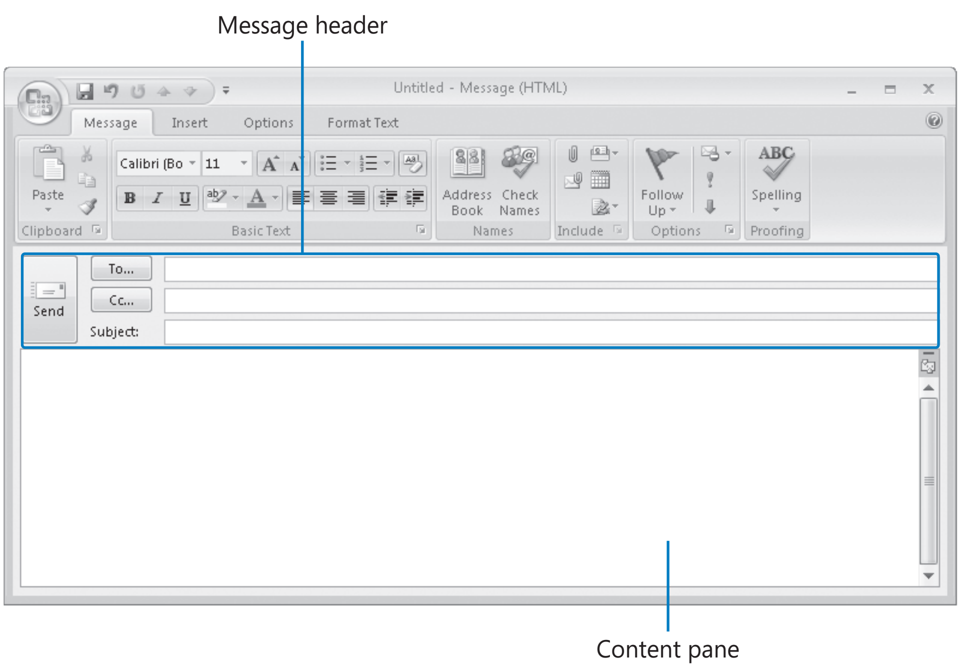
In this exercise, you will compose and send a new e-mail message. There are no practice files for this exercise.

BE SURE TO start Outlook and display the Inbox before beginning this exercise.

New Mail Message

1. On the **Standard** toolbar, click the **New Mail Message** button.

   A new message window opens.



> **Tip** By clicking the New Mail Message arrow, you can choose to create other types of Outlook items such as appointments, contacts, tasks, notes, or faxes, as well as organizational items such as folders and data files.

2. In the **To** box, type your own e-mail address.
3. In the **Subject** box, type **SBS Tradeshow Schedule**.

> **Important** The subject of this message begins with *SBS* so that you can easily differentiate it from other messages in your Inbox and Sent Items folders.

4. In the content pane, type **The following people will be working at the tradeshow:** and press the Enter key twice. Then type the following names, pressing Enter once after each of the first four names, and twice at the end: **Anna**, **Barry**, **Carl**, **Denis**, **Emma**.


Bullets

5. Select the list of names. Then on the **Message** tab, in the **Basic Text** group, click the **Bullets** button (not its arrow).

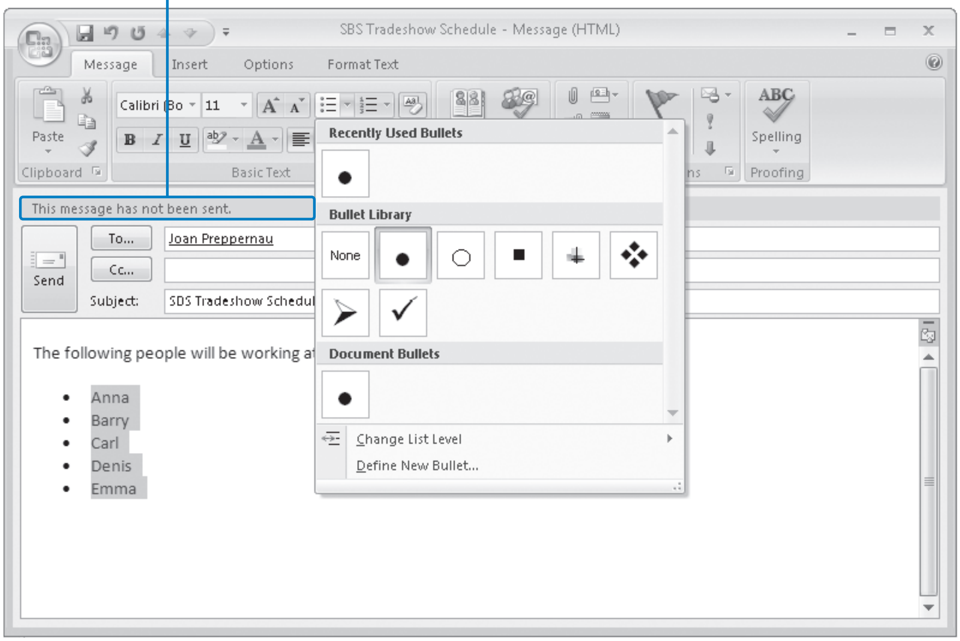
> **Tip** The Bullets button is also available in the Paragraph group on the Format Text tab.

Outlook converts the list of names to a simple bulleted list.

> **Tip** Depending on how quickly you complete this set of steps, Outlook might display a banner telling you that the message has not yet been sent. This is the signal that Outlook has saved a draft of the message.

6. With the bulleted list still selected, in the **Basic Text** group, click the **Bullets** arrow.

Outlook has saved a draft of this message.



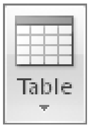
Notice the types of bullets available in the Bullet Library. You can change the list to use any of these bullets by clicking the bullet you want.

7. In the **Bullets** gallery, point to **Change List Level**.

   You can demote (or promote) a list item to any of nine levels, differentiated by the bullet character and indent level.

8. Press Esc twice to close the **Bullets** gallery without making changes.

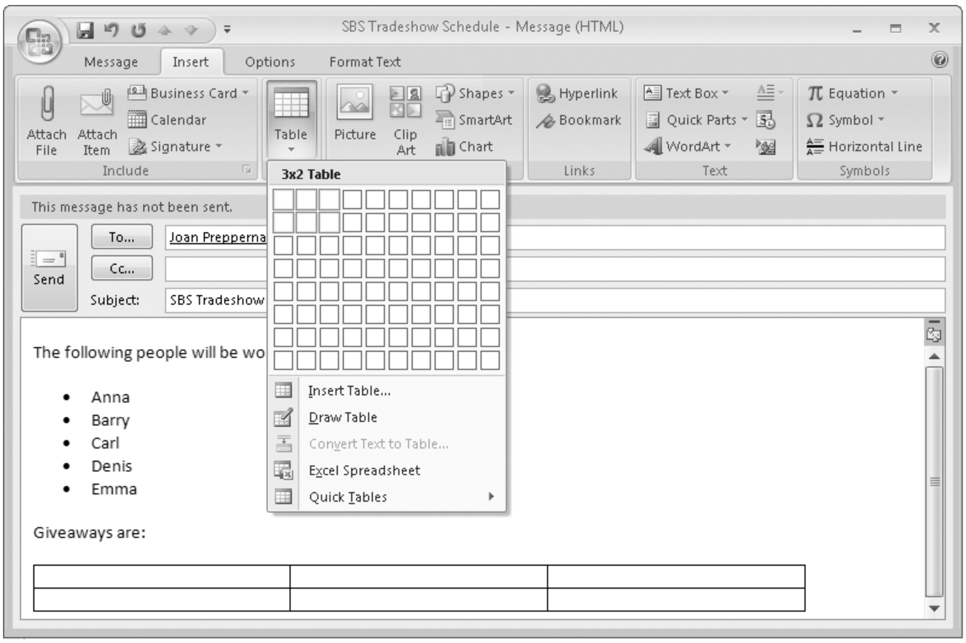
9. Press Ctrl+End to move the insertion point to the end of the message. Type **Giveaways are:** and then press Enter twice.



10. On the **Insert** tab, in the **Tables** group, click the **Table** button.

11. On the **Insert Table** menu, point to the third cell in the second row.

    A preview of the table appears in the message window behind the Insert Table menu. This is a display of the new live preview functionality available in many parts of Outlook and other programs in the 2007 Microsoft Office system. You can use live preview to see the effect of an option before you actually select it.

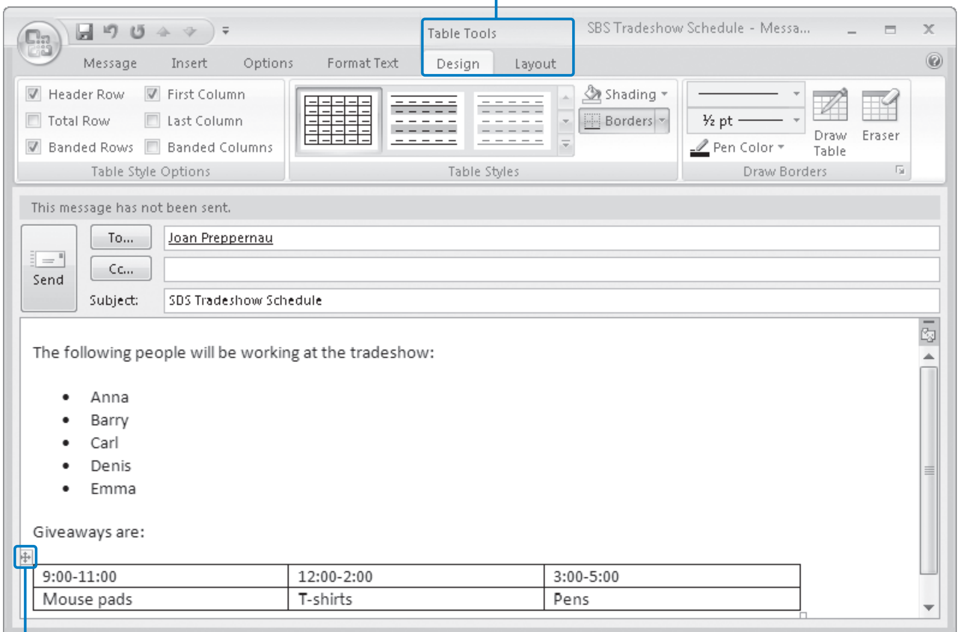


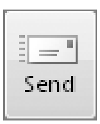
12. Click the selected cell to insert the table in the message.

    The Table Tools contextual tabs, *Design* and *Layout*, appear on the Ribbon. Contextual tabs appear only when the element they control is active (selected). Contextual tabs are differentiated from standard tabs by color: the contextual group name is highlighted and the active tab is colored. Contextual groups are differentiated from each other by color.

13. Enter the following information in the table:

9:00-11:00	12:00-2:00	3:00-5:00
Mouse pads	T-shirts	Pens





14. In the message header, click the **Send** button.

Outlook closes the message window and sends the message. When you receive the message in your Inbox, leave it there for use in a later exercise.

Attaching Files to Messages

A convenient way to distribute a file (such as a Microsoft Office Word document, Microsoft Office Excel spreadsheet, or Microsoft Office PowerPoint presentation) to other people is by attaching the file to an e-mail message. The message recipient can save the file to his or her hard disk, open the file from the message, or if he or she is using Outlook 2007, preview the file in the Reading Pane.

Resending and Recalling Messages

If you want to send a new version of a message you've already sent, for example, a weekly status report, you can ***resend*** the message. Resending a message creates a new version of the message with none of the extra information that might be attached to a forwarded message. To resend a message:

1. From your **Sent Items** folder, open the message you want to resend.
2. On the **Message** tab, in the **Actions** group, click the **Other Actions** button, and then in the list, click **Resend This Message**.

Outlook creates a new message form identical to the original. You can change the message recipients, subject, attachments, or content if you want before sending it.

If, after sending a message, you realize that you shouldn't have sent it (for example, if the message contained an error or was sent to the wrong people), you can ***recall*** it by instructing Outlook to delete or replace any unread copies of the message. To recall a message:

1. From your **Sent Items** folder, open the message you want to recall.
2. On the **Message** tab, in the **Actions** group, click the **Other Actions** button, and then click **Recall This Message**.
3. In the **Recall This Message** dialog box, click the option to delete unread copies of the message or the option to replace unread copies with a new message, and then click **OK**.

Message recall is available only for Exchange Server accounts.

You can send a file as a regular attachment or—if your organization has a collaboration site built on Microsoft SharePoint products and technologies—as a ***shared attachment***. When you send a shared attachment, Outlook creates a ***document workspace*** for the attached file and, rather than sending a copy of the file to each message recipient, sends an invitation to visit the workspace.

See Also For more information about shared attachments and document workspaces, see "Creating a Document Workspace from Outlook" in Chapter 27, "Enabling Collaboration by Using SharePoint."

In this exercise, you will send a Word document and a PowerPoint presentation as attachments to an e-mail message.

USE the *Attaching* document and the *Attaching* presentation. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\OutlookSending* folder.

BE SURE TO display the Inbox before beginning this exercise.

New Mail Message

1. On the **Standard** toolbar, click the **New Mail Message** button.
2. In the **To** box of the new message window, type your own e-mail address.

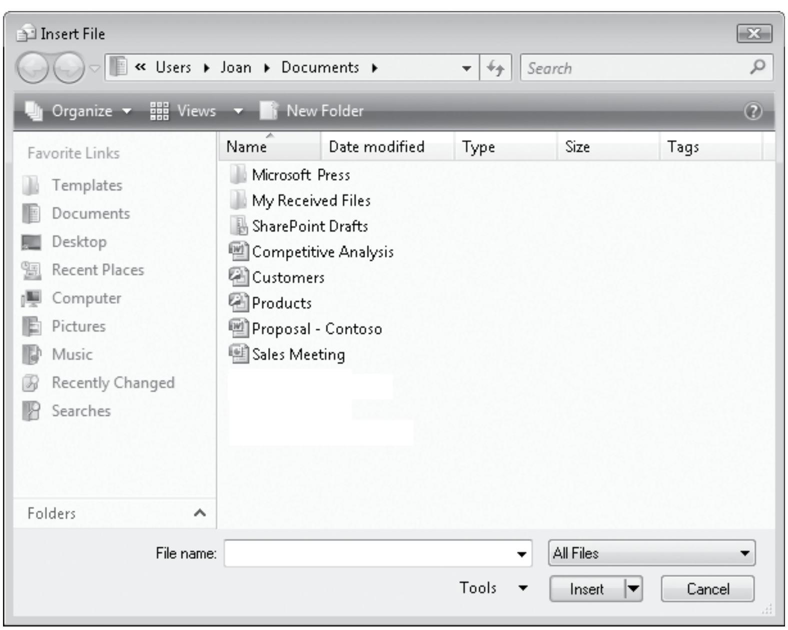
> **Tip** If you completed the previous exercise, Outlook will display your e-mail address in a list as you begin typing. You can insert the address by pressing the Down Arrow key to select it (if necessary) and then pressing Enter.

3. In the **Subject** box, type **SBS First Draft**.
4. In the content pane, type **Here is some information for your review.** Then press Enter to move to the next line.

5. On the **Message** tab, in the **Include** group, click the **Attach File** button.

> **Tip** A larger version of the Attach File button is available in the Include group on the Insert tab.

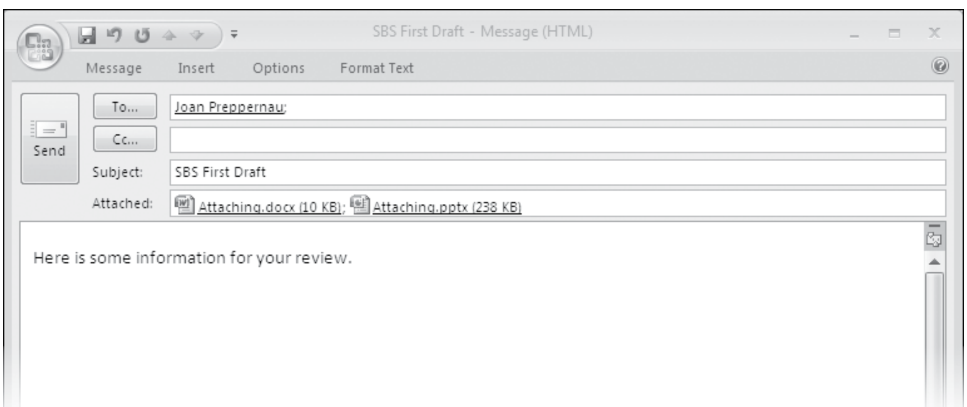
The Insert File dialog box opens, displaying the contents of your *Documents* folder.

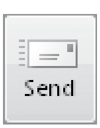


6. Browse to the *Documents\Microsoft Press\2007OfficeSBS\OutlookSending* folder, click the *Attaching* document, hold down the Ctrl key, click the *Attaching* presentation, and then click **Insert**.

> **Troubleshooting** By default, Windows does not display file extensions in Windows Explorer windows or dialog boxes. You can usually differentiate file types by their icons—for example, the Word icon precedes the *Attaching* document name. However, the icon preceding a PowerPoint 2007 presentation is an image of the first slide in the presentation, and in the default Small Icons view, you will probably see only the slide background.
>
> You can display the file type by clicking Details on the Views list, or you can display larger icons by clicking Extra Large Icons, Large Icons, Medium Icons, or Tiles on the Views list. In these views, you can see that the PowerPoint icon appears in the lower-right corner of the icon image. If you want Windows to display file extensions, display a folder (such as your *Documents* folder) in Windows Explorer, click Folder And Search Options on the Organize menu, and then on the View tab of the Folder Options dialog box, clear the Hide Extensions For Known File Types check box, and click Apply or OK.

The files appear in the Attached box in the message header.





7. In the message header, click the **Send** button.

   Outlook closes the message window and sends the message. When you receive the message in your Inbox, leave it there for use in a later exercise.

Sending Contact Information

You can send your own or someone else's contact information from your address book to another Outlook user by attaching the contact's Outlook business card to an e-mail message. The recipient can then save the contact information in his or her own address book.

To send a business card:

1. In the message window, on the **Message** tab, in the **Include** group, click the **Insert Business Card** button, and then in the list, click **Other Business Cards**.

   Tip Business cards that you've previously sent appear in the Insert Business Card list. You can insert a card in the message by selecting it from the list.

2. In the **Insert Business Card** dialog box listing all your contacts, select the card or cards you want to send, and then click **OK**. If you have multiple address books, you can display a different address book in the dialog box by clicking it in the Look In list.

   To select multiple sequential cards, click the first card, hold down the Shift key, and then press the Up Arrow or Down Arrow key to select additional cards. To select multiple non-sequential cards, click the first card, hold down the Ctrl key, click the next card, and so on.

The message recipient can add the contact to his or her main address book by dragging the business card from the received message to the Contacts module or by opening the card from the message and then clicking the Save & Close button.

Tip Readers of *Microsoft Office Outlook 2007 Step by Step* by Joan Preppernau and Joyce Cox (Microsoft Press, 2007) wrote asking how to create mail-merge e-mail messages from Outlook. This is actually a function of Word, rather than Outlook. For information about creating e-mail messages to multiple recipients by using mail-merge, see *Microsoft Office Word 2007 Step by Step* by Joyce Cox and Joan Preppernau (Microsoft Press, 2007).

Creating and Formatting Business Graphics

The saying that "a picture is worth a thousand words" is especially true in business communications, when you need to clearly explain facts or concepts, particularly to an increasingly global audience. Several programs in the 2007 Office system include a new feature called ***SmartArt***. This tool is very useful for creating professional business graphics within documents, spreadsheets, presentations, and messages. You can easily create lists and diagrams depicting relationships, processes, cycles, hierarchies, and so on in your e-mail messages. When sending a message, Outlook converts any SmartArt graphics within the message to static graphics.

In this exercise, you will create a SmartArt diagram within an e-mail message. There are no practice files for this exercise.

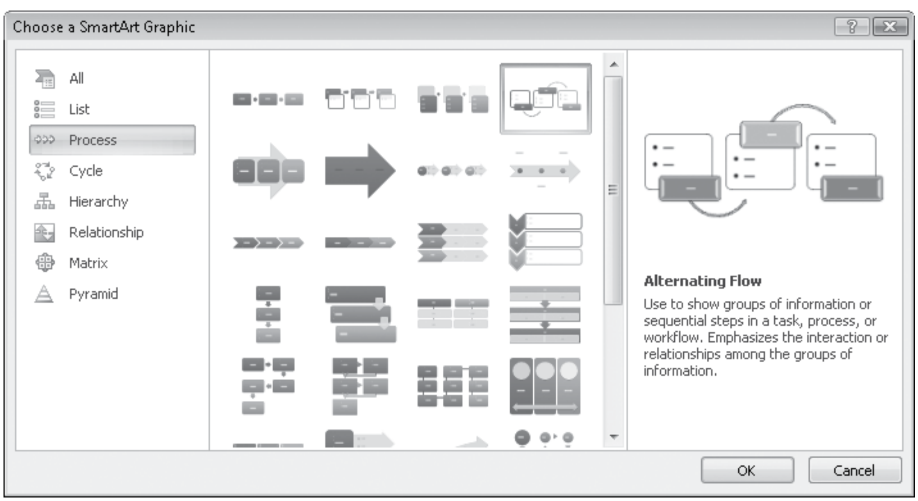
BE SURE TO display the Inbox before beginning this exercise.
OPEN a new message window.

1. Maximize the message window, and then click in the content pane.

2. On the **Insert** tab, in the **Illustrations** group, click the **SmartArt** button.

   The Choose A SmartArt Graphic dialog box opens.

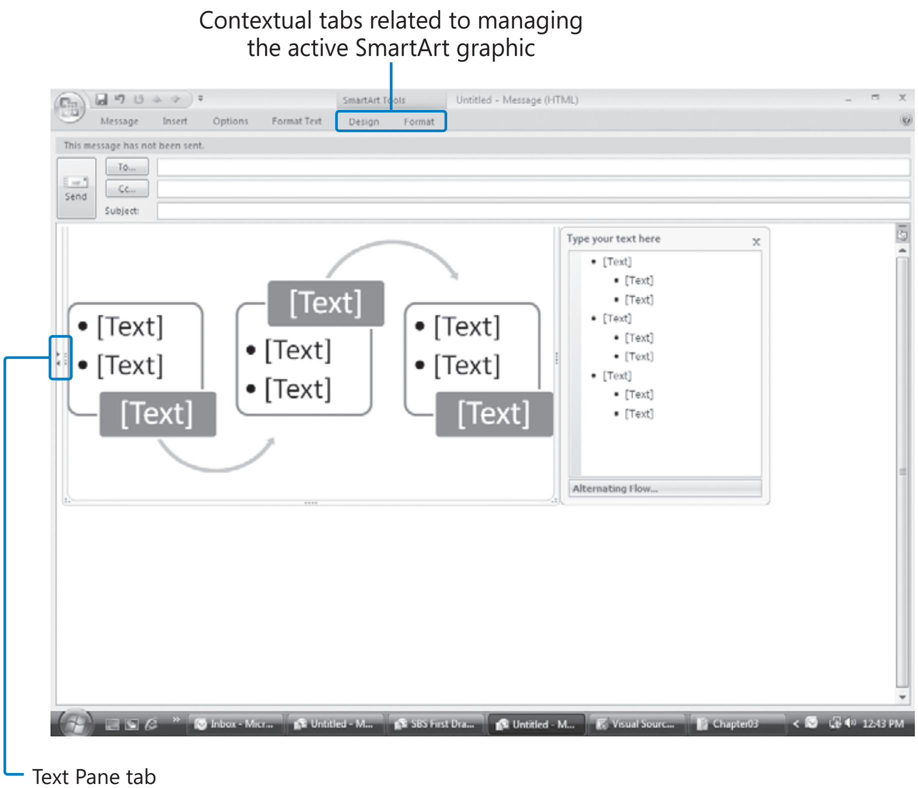
3. Scroll the center pane of the dialog box for an overview of the available SmartArt graphics. You can display the name of a graphic by pointing to it.
4. In the left pane, click **Process**, and then in the center pane, click the last icon in the top row (**Alternating Flow**).



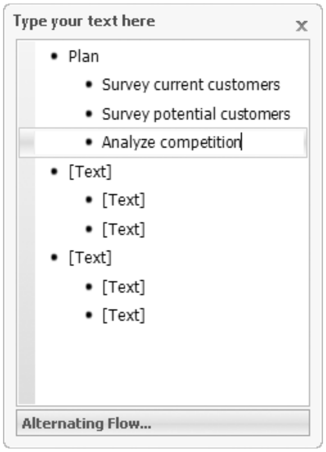
A preview of the selected SmartArt graphic appears in the right pane. This is a process diagram showing the details of a three-step process.

5. In the **Choose a SmartArt Graphic** dialog box, click **OK**.

Outlook inserts the selected process diagram in the content pane. It looks similar to the preview graphic, but without the colors and three-dimensional aspects. (You select formatting options later.) The SmartArt Tools contextual tabs, *Design* and *Format*, appear on the Ribbon.



> **Tip** You can display or hide the Text Pane for any SmartArt diagram by clicking the diagram and then clicking the Text Pane button in the Create Graphic group on the Design contextual tab, or by clicking the Text Pane tab on the left side of the diagram drawing area.



You can enter text in the Text Pane or directly in the diagram—selecting a diagram element or positioning the insertion point within the bulleted list also selects the corresponding element in the diagram or Text Pane. The diagram type appears at the bottom of the Text Pane; pointing to it displays a ScreenTip describing the purpose of the selected type of diagram.

6. In the **Text Pane**, click the **[Text]** placeholder to the right of the first bullet, and then type **Plan**.

   As you type in the pane, the text appears in the diagram.

7. Click the **[Text]** placeholder to the right of the first second-level bullet, and type **Survey current customers**. Press the ↓ key to move to the next second-level bullet, and then type **Survey potential customers**.

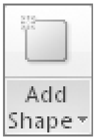
   The font size in the diagram adjusts to fit the available space.

8. Press Enter to create another second-level bullet in the **Text Pane** and in the diagram, and then type **Analyze competition**.

9. In the diagram, click the second solid blue box to select the placeholder, and then type **Define**.

   As you type, the text also appears in the second first-level bullet in the Text Pane.

10. In the third solid blue box, type **Design**.



11. On the **Design** contextual tab, in the **Create Graphic** group, click the **Add Shape** arrow (not the button), and then in the list, click **Add Shape After**.

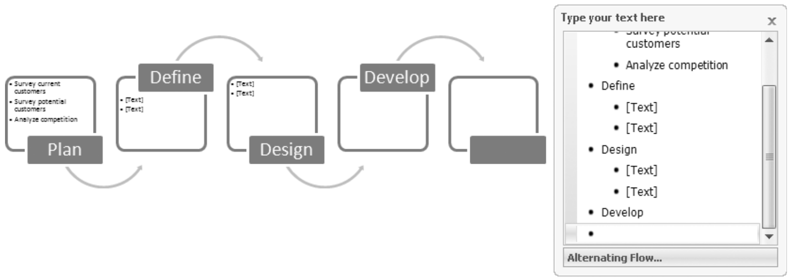
    An additional item appears at the right end of the diagram and in the Text Pane.

You can add shapes above, below, before, or after the selected shape, depending on the diagram layout.

12. In the new solid blue box, type **Develop**.

13. In the **Text Pane**, click at the end of the word *Develop*, and then press Enter.

A first-level bullet and additional shape appear.

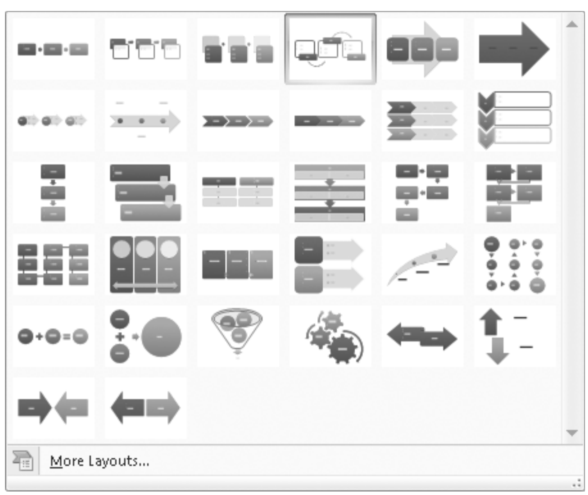


14. Type **Test**, and then in the **Text Pane**, click the **Close** button.

At its current size, the text within the diagram is very difficult to read.

15. Point to the move handle on the right side of the diagram until the pointer becomes a double-headed arrow. Drag the move handle to the right to fill the message window.

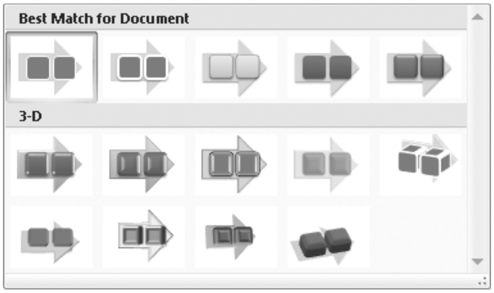
16. In the **Layouts** group, click the **More** button.



17. In the **Layouts** gallery, point to a few of the diagram layouts to display live previews. Then click the fifth icon in the first row (**Continuous Block Process**).

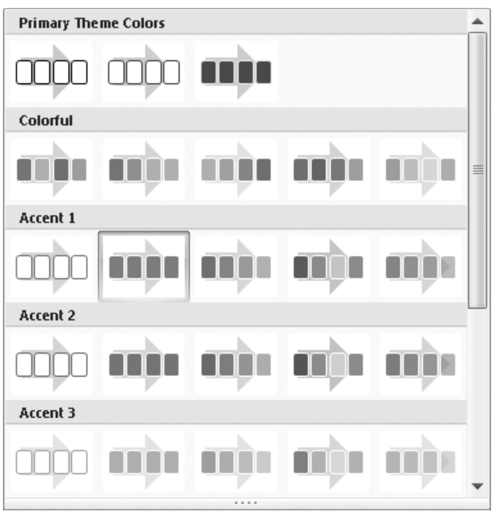
    The process diagram layout changes, but the contents remain the same.

18. In the **SmartArt Styles** group, click the **More** button.



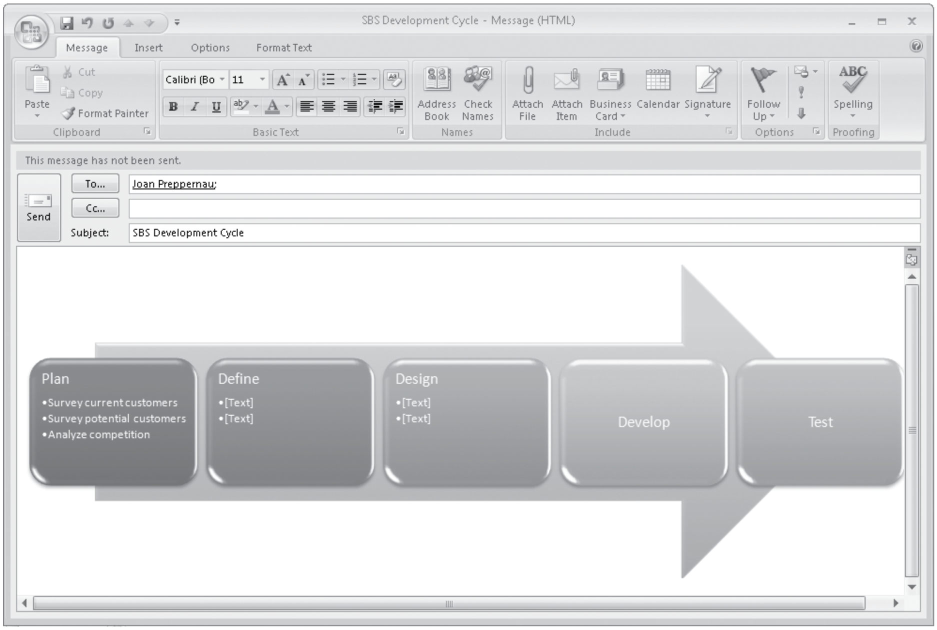
19. In the **SmartArt Styles** gallery, point to a few of the diagram styles to display live previews. Then in the **3-D** area, click the first icon (**Polished**).

20. In the **SmartArt Styles** group, click the **Change Colors** button.



The color schemes displayed in the Colors gallery are variations of the current theme and are organized in groups reflecting the six thematic accent colors. Changing the theme also changes the color schemes in the gallery.

21. Point to a few of the diagram styles to display live previews. Then in the **Colorful** area, click the second icon (**Colorful Range – Accent Colors 2 to 3**).
22. Enter your own e-mail address in the **To** box, and type SBS Development Cycle in the **Subject** box.



23. Send the message, and then display your Inbox.
24. When you receive the message, the diagram is visible in the **Reading Pane**. Open the message, and click the diagram.

    The diagram is no longer an active SmartArt graphic; it has been converted to a static image. If you open the message from your Sent Items folder, you will find that the same is true of the diagram in that message.

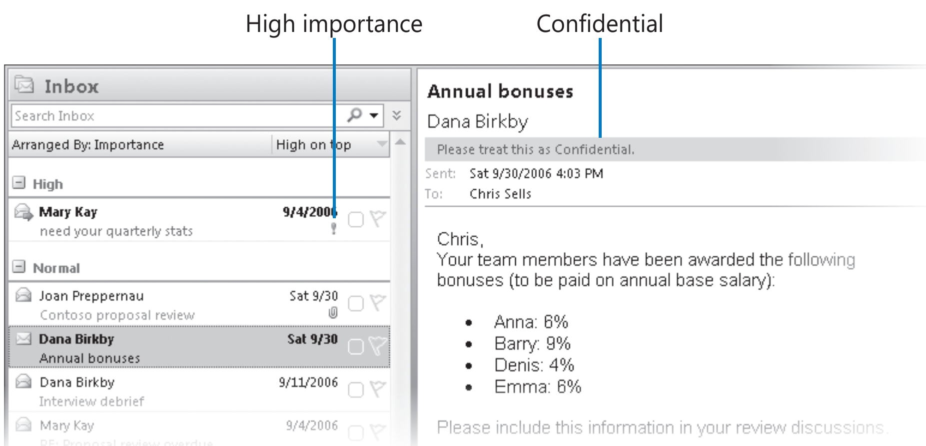
CLOSE the message window, and retain the message in your Inbox for use in a later exercise.

Changing Message Settings and Delivery Options

When sending a message, you can optionally include visual indicators of the importance, sensitivity, or subject category of a message or other Outlook item, restrict other people from changing or forwarding message content, provide a simple feedback mechanism in the form of voting buttons, and specify message delivery options to fit your needs.

Common message settings and delivery options include:

- **Importance.** You can indicate the urgency of a message by setting its ***importance*** to High or Low. A corresponding banner appears in the message header and, if the Importance field is included in the view, an importance icon appears in the Inbox or other message folder.

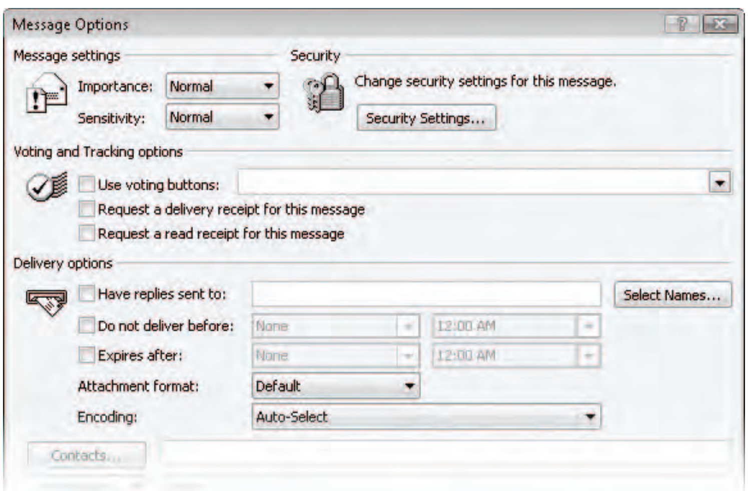


  You can easily sort and group messages based on importance by clicking Importance in the Arranged By list.

- **Sensitivity.** You can indicate that a message should be kept private by setting its ***sensitivity*** to Confidential, Personal, or Private). No indicator appears in the message folder, but a banner appears in the message header to indicate a sensitivity other than Normal. You can choose to include the sensitivity as one of the message attributes shown in the Inbox pane, but if you do, it replaces the message subject, which isn't very helpful.
- **Security.** If you have a digital ID, you can digitally sign the message; or you can encrypt the contents of the message.

- **Voting options.** If you and your message recipients have Exchange Server accounts, you can add ***voting buttons*** to your messages to enable recipients to quickly select from multiple-choice response options.
- **Tracking options.** You can track messages by requesting delivery receipts and read receipts. These receipts are messages automatically generated by the recipient's e-mail server when it delivers the message to the recipient and when the recipient reads the message.
- **Categories.** You can assign a message to a color category that will be visible to the recipient if he or she views the message in Outlook.

The most commonly used options are available in the Options group on the Message tab of the message window. You can access other options from the Message Options dialog box, which you open by clicking the Dialog Box Launcher in the lower-right corner of the Options group.



You can limit the actions other people can take with messages they receive from you by restricting the message permissions. For example, you can prevent recipients from forwarding or printing the message, copying the message content, or changing the content when they forward or reply to the message. (Restrictions apply also to message attachments.) Within a message window, permission options are available both on the Office menu and in the Options group on the Message tab.

Personalizing the Appearance of Messages

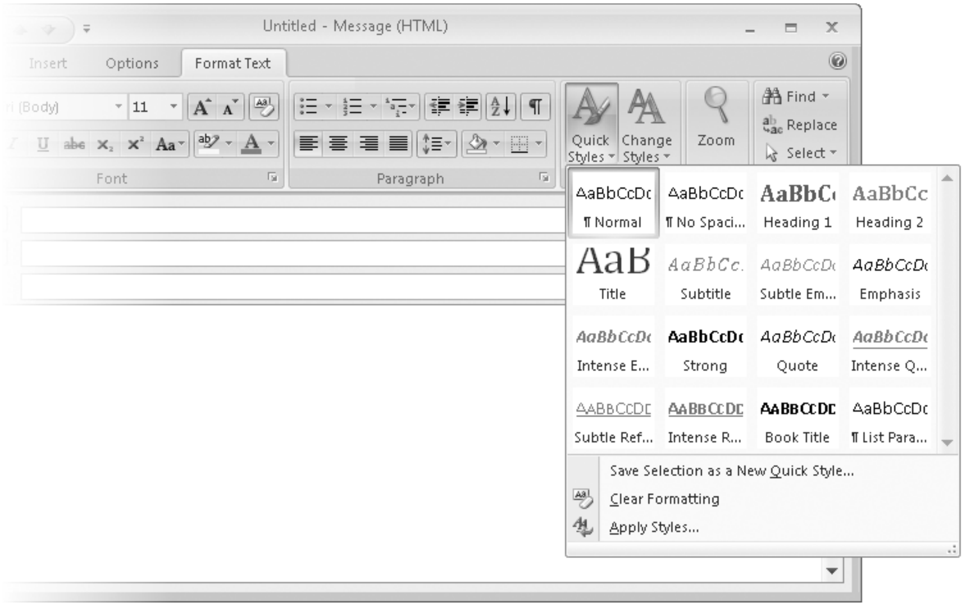
By default, the content of an Outlook message appears in black, 10-point Calibri (a very readable ***sans serif*** font that is new in this release of the Office system), arranged in left-aligned paragraphs on a white background. You can change the appearance of a message either by applying ***local formatting*** (text or paragraph attributes) or ***global formatting*** (a theme or style).

The local formatting options available in Outlook 2007 are largely the same as those available in Word and other programs in the 2007 Office system, and you might already be familiar with them from working with those programs. Here's a quick review of the types of formatting changes you can make:

- **Font, size, and color.** More than 220 fonts in a range of sizes and in a virtually unlimited selection of colors.
- **Font style.** Regular, bold, italic, or bold italic.
- **Underline style and color.** Plain, multiple, dotted, dashed, wavy, and many combinations thereof, in every color of the rainbow.
- **Effects.** Strikethrough, superscript, subscript, shadow, outline, emboss, engrave, small caps, all caps, or hidden.
- **Character spacing.** Scale, spacing, position, and kerning.
- **Paragraph attributes.** Alignment, indentation, and spacing.

The global formatting options are sets of local formatting that you can apply with a couple of clicks. You use a theme to apply a pre-selected combination of several formatting options to the entire message. In addition, the 2007 Office system introduces a handy new set of formatting options called Quick Styles that you can apply to individual elements of a message.

You are more likely to use Quick Styles when working in Word documents than in messages, but we'll give you an overview and you can investigate further on your own. Within a message window, Quick Styles are available in the Styles group on the Format Text tab. They include a number of standard styles for titles, headings, lists, quotes, emphasis, and so on. You can see a live preview of the effect of a style on your text by pointing to the style in the Quick Styles gallery.



You can change the appearance of all the styles in the Quick Styles gallery by selecting any of the 11 available style sets (or creating your own). Selecting a style set changes the appearance of all the text in the current document, as well as the appearance of the icons in the Quick Style gallery. You can select or preview a style set, color scheme, or font set by clicking the Change Styles button in the Styles group on the Format Text tab and then pointing to Style Set, Colors, or Fonts.

See Also **For more information about Quick Styles, style sets, color schemes, and font sets, refer to** ***Microsoft Office Word 2007 Step by Step*** **by Joyce Cox and Joan Preppernau (Microsoft Press, 2007).**

In this exercise, you will experiment with some of the formatting features that are new or improved in this version of Outlook while changing the font and background color of an e-mail message. Then you will apply a theme to the same message, overwriting the local formatting. There are no practice files for this exercise.

BE SURE TO display the Inbox before beginning this exercise.

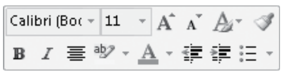
OPEN a new message window.

1. In the content pane, type

   Looking forward to seeing you next week at the celebration!

2. Select the sentence you just typed by pointing to its left edge until the pointer becomes an arrow (pointing at the paragraph) and then clicking once.

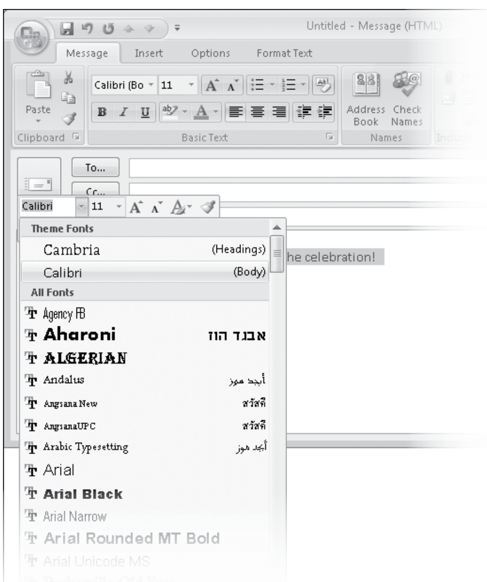
   The Mini toolbar appears.

   This context-sensitive toolbar makes several common formatting options immediately available when you select a letter, word, or phrase by using the mouse. When the toolbar first appears, it is nearly transparent, and it disappears in a short time if you don't activate it by pointing to it.

Font

3. On the **Mini toolbar**, click the **Font** arrow.

Tip If the Mini toolbar is not visible, you can find the Font box in the Basic Text group on the Message tab, and in the Font group on the Format Text tab.

Many more fonts are available in Outlook 2007 than in previous versions of Outlook. The name of each font appears in the list in that font, so you can easily select a font that appeals to you.

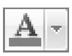
4. Scroll the **Font** list, noting the many available fonts, and then click **Franklin Gothic Medium**.

   The font of the selected text changes.

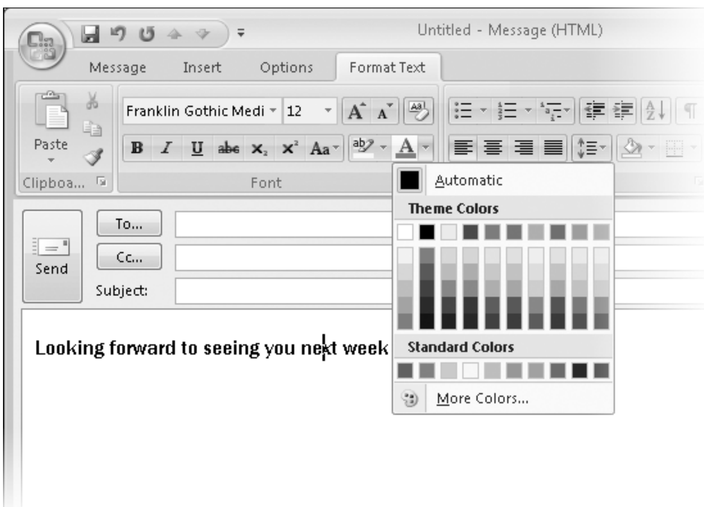
Font Size

5. On the **Mini toolbar** or in the **Font** group on the **Format Text** tab, click the **Font Size** arrow, and in the list, click **12**.

   The size of the selected text changes.


Font Color

6. Click once in the word *next*, without selecting any letters. Then on the **Format Text** tab, in the **Font** group, click the **Font Color** arrow.



   Outlook 2007 offers a new palette of theme colors (which change depending on the selected theme) and standard colors.

7. In the **Font Color** gallery, in the **Standard Colors** area, click the **Red** box.

   The font color of the word *next* changes to red. Notice that the entire word changes even though you didn't select it. This is a new feature of Outlook 2007.


Format Painter

8. Double-click the word *next*, and on the **Mini toolbar** (or in the **Clipboard** group), click the **Format Painter** button. Then click once in the word *week*.

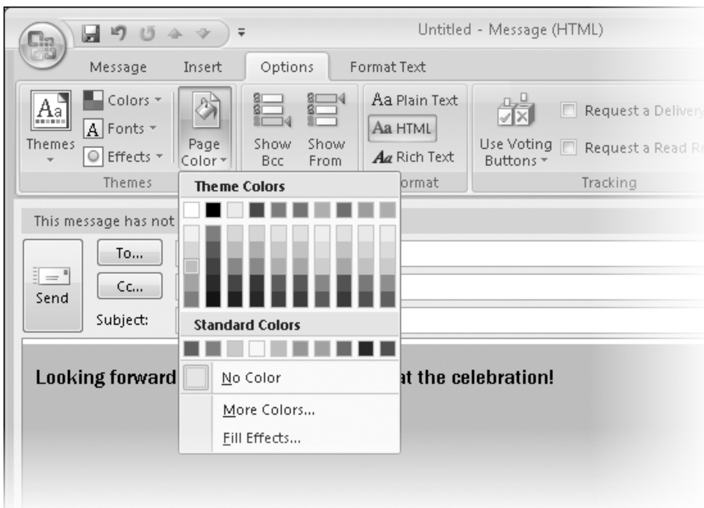
Outlook copies the formatting of the word *next* to the word *week*. By using the Format Painter, you can copy formatting from one item to any other item. To copy formatting to multiple items, double-click the Format Painter button to turn it on and then click it again to turn it off after you're finished applying the formatting.

9. On the **Options** tab, in the **Themes** group, click the **Page Color** button.

   The Page Color gallery includes the same theme colors and standard colors as the Font Color gallery.

10. In the **Page Color** gallery, point to any color.

    Outlook displays a live preview of the color in the message window.



11. In the **Page Color** gallery, in the color gradient area, click the second shade down in the fifth column from the left (**Accent 1, Lighter 60%**).

    The message background changes to the selected color.

12. In the **Themes** group, click the **Themes** button.

    Outlook displays a gallery of themes. In each theme icon, the theme colors appear across the bottom, and the presentation background appears on the right.

13. In the **Themes** gallery, click **Oriel**.

The message background and font change to those of the theme.

Notice that the colors displayed on the Colors button in the Themes group have changed.

14. In the **Themes** group, click the **Page Color** button. In the list, compare the new page background to the new set of colors displayed in the color gradient area. The page background color is still *Accent 1, Lighter 60%* (the shade you selected in step 11).

> **Tip** The formatting changes you make in this exercise apply only to the active message and will not be automatically applied to other messages.

15. Enter your own e-mail address in the **To** box; type SBS Festival Reminder in the **Subject** box, and then send the message.

    When you receive the message in your Inbox, leave it there for use in a later exercise.

> **Tip** You can change the colors, fonts, and effects associated with a theme by clicking those buttons in the Themes group on the Options tab. You might want to experiment with different combinations on your own. However, Outlook offers such an extensive selection of themes that you will more than likely find that one of these ready-made combinations fits your needs.

Adding Signatures to Messages Automatically

When you create a paper-based message, you can add a signature at the end of the message by writing your name. When you create an Outlook message, you can add an ***e-mail signature*** at the end of the message by manually or automatically inserting a predefined block of text (with optional graphics). An e-mail signature provides consistent information to message recipients. You can include any text or graphics you want in your e-mail signature; you would commonly include your name and contact information, but depending on your own situation you might also include information such as your company name, job title, a legal disclaimer, a corporate or personal slogan, a photo, and so on. When using Outlook 2007, you can choose to include your electronic business card as part or all of your e-mail signature.

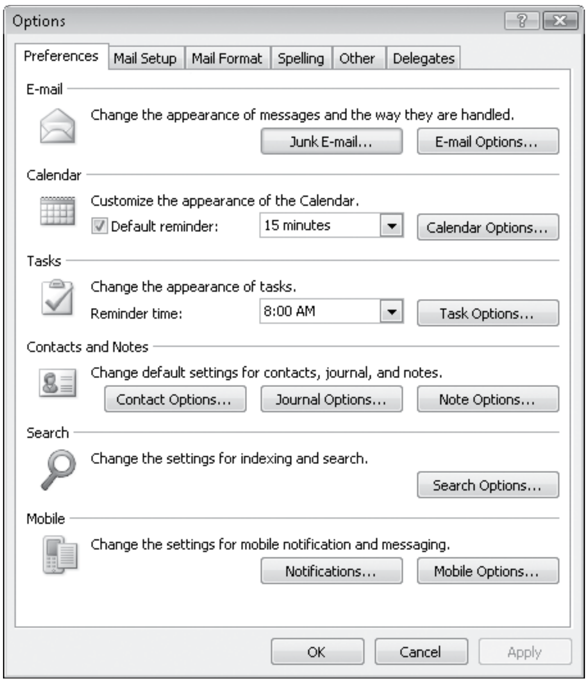
You can create different signatures for use in different types of messages. For example, you might create a formal business signature for client correspondence, a casual business signature for interoffice correspondence, and a personal signature for messages sent from a secondary account. Or you might create a signature containing more information to send with original e-mail messages, and a signature containing less information to send with message replies. You can format the text of your e-mail signature in the same ways that you can format message text.

In this exercise, you will create an e-mail signature and then instruct Outlook to insert the signature in all the new messages you create. There are no practice files for this exercise.

BE SURE TO display the Inbox before beginning this exercise.

1. On the **Tools** menu, click **Options**.

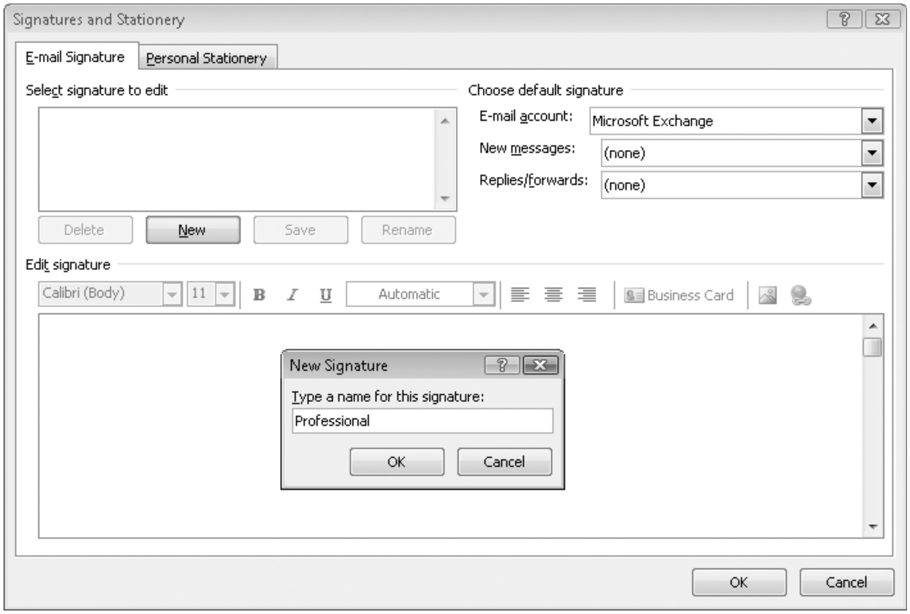
   The Options dialog box opens.



2. On the **Mail Format** tab, click **Signatures**.

   The Signatures And Stationery dialog box opens.

3. On the **E-mail Signature** tab, click **New**.



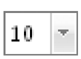
4. In the **New Signature** dialog box, type **Professional** as the name of your new e-mail signature, and then click **OK**.

   Outlook creates the *Professional* signature.

5. In the **Edit signature** area, type **Regards** followed by a comma, press the Enter key, and then type your name.

Font

6. Select your name, click the **Font** arrow, and then in the list, click **Lucida Handwriting** (or any other font you like).

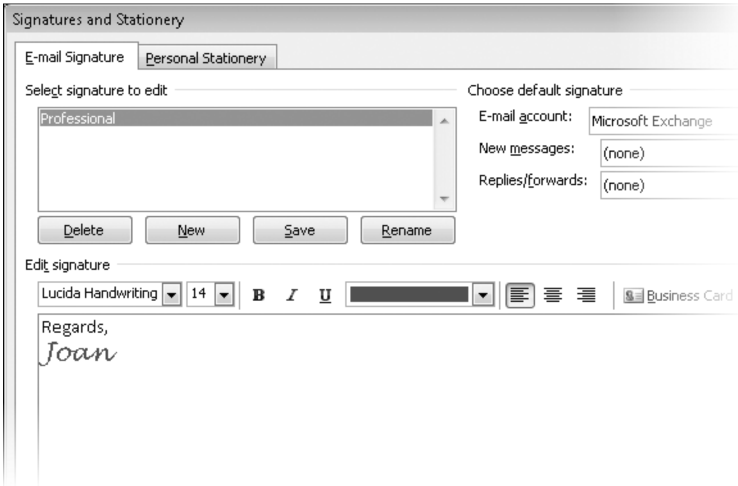


Font Size

7. Click the **Font Size** arrow, and then in the list, click **14**.


Font Color

8. Click the **Font Color** arrow, and then in the **Standard Colors** area, click the **Purple** box. Then click away from your name to see the results of your changes.



9. Apply any other types of formatting you want.

> **Tip** If you would like to include your electronic business card as part of your signature, click the Business Card button. Then in the Insert Business Card dialog box, locate and click your name, and click OK.

You can manually insert any signature you create in an e-mail message, but it is more common to instruct Outlook to automatically insert it for you.

10. In the **Choose default signature** area, click the **New messages** arrow, and then in the list, click **Professional**.

    Outlook will now insert your signature into all new e-mail messages you send from this account, but not into replies or forwarded messages.

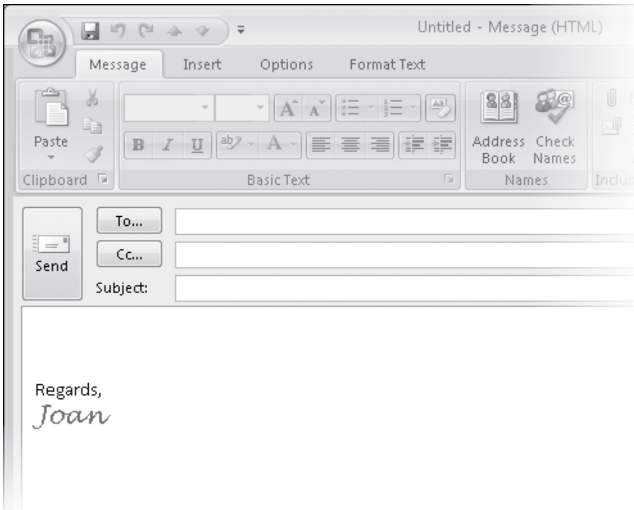
> **Tip** If you have more than one e-mail account set up in Outlook, you can instruct Outlook to insert a different signature in messages sent from each account. To do so, click the account in the E-mail Account list, click the signature you want to use with that account in the New Messages and/or Replies/Forwards list, and then click OK.

11. Make any other changes you want, and then click **OK** in the two open dialog boxes.

New Mail Message

12. On the **Standard** toolbar, click the **New Mail Message** button.

A new message opens, with your e-mail signature in the content pane.



Tip You can remove the automatically inserted signature from a message by selecting and deleting it as you would any other text.

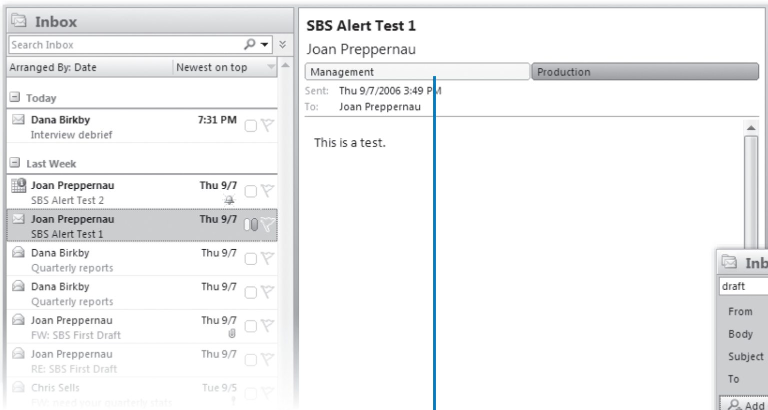
CLOSE the message window.

BE SURE TO reset the New Messages signature to <none> if you don't want to use the Professional signature you created in this exercise.

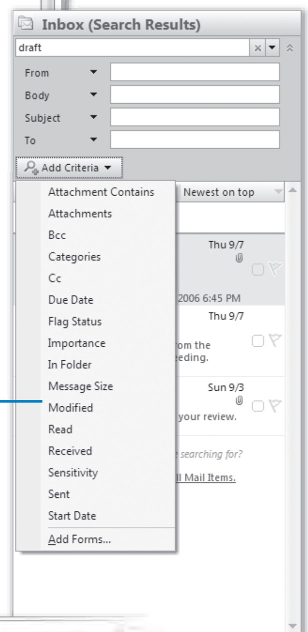
Key Points

- All the commands you need when creating a message in Outlook 2007 are available on the Ribbon at the top of the message window, grouped on tabs by function.
- You can easily create e-mail messages that include text and attachments.
- You can send messages in a variety of formats. Some message formats support more formatting options than others. Recipients using e-mail programs that don't support HTML or Rich Text Formatting will see the message in plain text.
- You can format the text and background of your messages, either by choosing individual formatting options and styles or by applying a theme.
- You can create professional business graphics by using the new SmartArt feature available in Outlook 2007, Word 2007, and PowerPoint 2007.
- You can automatically insert contact information in e-mail messages by using an electronic signature. You can create different signatures for different purposes and instruct Outlook to insert a specific signature depending on the e-mail account and message type.

Chapter at a Glance

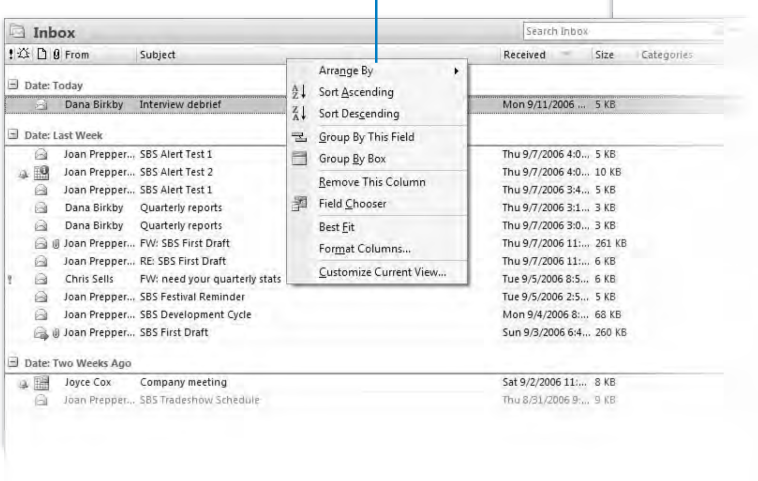


Organize messages by using color categories, **page 523**



Quickly locate messages, **page 506**

Arrange messages in different ways, **page 510**



18 Managing Your Inbox

In this chapter, you will learn to:

- ✔ Quickly locate messages.
- ✔ Arrange messages in different ways.
- ✔ Organize messages by using color categories.
- ✔ Organize messages in folders.
- ✔ Archive messages.

So far in this book, we've discussed the basic mechanics of sending and receiving messages, and the Outlook components used for those purposes. Now we'll tackle the task that heavy e-mail users spend a lot of time on—managing the messages you receive. This is where Microsoft Office Outlook 2007 really stands apart from its competitors.

In addition to providing ways to organize messages in subfolders within the Inbox and to archive messages, Outlook 2007 includes a number of new features that simplify the process of managing messages and other Outlook items. The greatest of these is the new Instant Search capability, which filters messages as you type the keywords you want to search for, highlighting the search terms within each message. Another useful tool is Color Categories, which combines the named categories available in earlier versions of Outlook with colored labels to provide quick visual recognition and search capabilities.

In this chapter, you will filter and find messages by using Instant Search, display the messages in your Inbox in a variety of arrangements, and use Search Folders. Then you will organize messages by assigning color categories and by organizing them in folders within the Inbox. Finally, you will look at the default archive settings and manually archive an e-mail folder.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important The exercises in this chapter require only practice files created in earlier chapters; none are supplied on the companion CD. For more information about practice files, see “Using the Companion CD” at the beginning of this book.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the “Information for Readers Running Windows XP” section at the beginning of this book.

Quickly Locating Messages

Although you can use Instant Search in the Calendar, Contacts, and Tasks modules, you will most often use it to locate messages in your Inbox and other mail folders. You can search a particular mail folder or search all mail folders.

See Also For information about mail folders, see “Organizing Messages in Folders” later in this chapter.

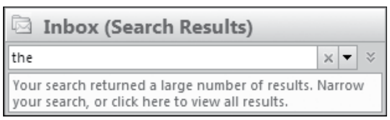
As you define the criteria for a search, Outlook filters out all messages that don’t match, making it easy to find exactly what you’re looking for. And here’s the neat thing: Outlook searches not only the content of the e-mail message header and the message itself, but also the content of message attachments. So if the search term you’re looking for is in a Microsoft Office Word document attached to a message, the message will be included in the search results.

Tip You can’t instantly filter content in a Public Folder (if your organization uses these) but you can enter the search criteria and then click the Search button to get the same results as you would in your Inbox.

Instant Search is based on the same technology that drives the search functionality in Windows Vista. With this very powerful search engine, you can find any file on your computer containing a specified search term—whether in a file or folder name, in document or spreadsheet content, in an e-mail message within Outlook, in a message attachment, in a picture, music, or video file, and so on. As a matter of fact, if you prefer to do so, you can conduct all of your Outlook searches from the Windows Vista Start menu.

See Also **For information about Windows Vista search features, refer to** *Windows Vista Step by Step* **by Joan Preppernau and Joyce Cox (Microsoft Press, 2007).**

If the search term you enter produces more than 200 results, the Search Results pane displays this information bar:



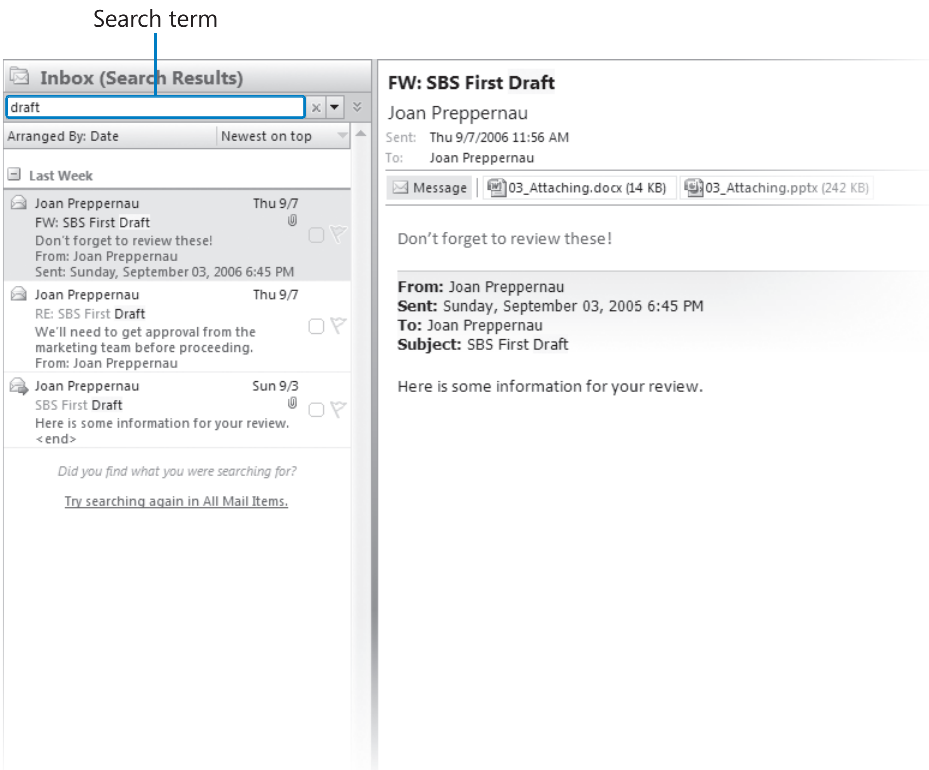
You can display all the results for the current search term by clicking the message bar, or you can narrow the results by expanding the search term or by specifying other search criteria, such as the sender, the recipient (whether the message was addressed or only copied to you), whether the message contains attachments, and so on.

In this exercise, you will use the Instant Search feature to locate a specific message in your Inbox. There are no practice files for this exercise.

BE SURE TO start Outlook, display your Inbox, and display the Reading Pane before beginning this exercise.

1. In the **Search Inbox** box in the Inbox header, type one or more words likely to appear in messages in your Inbox. For example, if you completed the exercises in previous chapters of this book, you could enter **draft** or **development**.

As you type, Outlook filters the contents of your Inbox to display only those items containing the characters, word, or words you enter, and highlights the search term in the displayed messages.



In the lower-left corner of the program window, the status bar displays the number of messages included in the search results. The search results include only messages contained in the Inbox folder and not in any of its subfolders or any other mailbox folders.

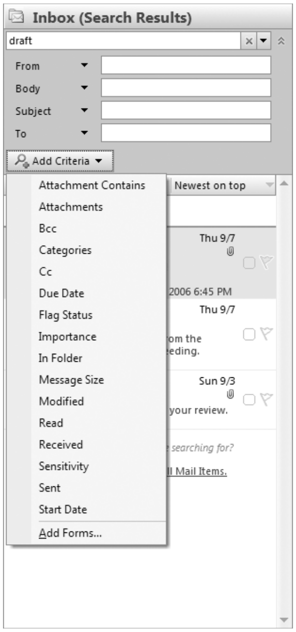

Expand the Query Builder

2. To the right of the **Search Inbox** box, click the **Expand the Query Builder** button.

   The search pane expands to include text boxes in which you can specify the sender, a term that appears in the message body, a term that appears in the message subject, or a primary recipient of the message.

3. In the expanded **Search Results** pane, click **Add Criteria** to display a list of additional criteria.

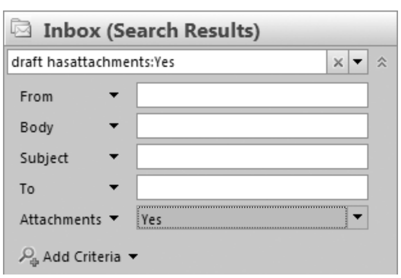
Selecting a field from this list adds the field to the search criteria section.



Alternatively, you can click the arrow to the right of any of the default criteria and select a different field.

4. In the **Add Criteria** list, click **Attachments** to add that field to the search pane.
5. Click the **Attachments** arrow, and then in the list, click **Yes**.

   Notice that your search criteria are also described in the search term box.



Outlook instantly updates the search results to display only the messages in your Inbox that contain the search term and one or more attachments.

6. To expand the search to include all the folders in your mailbox, at the end of the list of results shown in the Search Results pane, click **Try searching again in All Mail Items**.

   Outlook displays the expanded search results grouped by the folder in which they appear. You can open, delete, and process a message from the Search Results pane as you would from any other. If, however, you change a message so that it no longer fits the search criteria—for example, if you search for flagged messages and then mark the message task as complete, the message no longer appears in the Search Results pane. (It does still appear in whatever folder it is in.)


Clear Search

7. Experiment with locating information by specifying criteria. When you finish, click the **Clear Search** button to remove the filter and redisplay the Inbox message list.

Arranging Messages in Different Ways

As the number of messages in your Inbox increases, it can be challenging to prioritize them. You can customize how you view, arrange, sort, and group messages in Outlook to help you quickly determine which are the most important, decide which can be deleted, and locate any that need an immediate response. You can view only certain groups of messages, such as messages received in the last seven days, unread messages, or messages sent to a certain person or distribution list. You can also view a timeline of all your received messages. Outlook 2007 offers the following eight predefined ***views***, and you can customize any of these to fit your needs:

Category views	**List views**	**Other views**
Messages	Messages with AutoPreview	Message Timeline
Sent To	Last Seven Days	
Outlook Data Files	Unread Messages in This Folder	
Documents		

In category views, the Inbox header includes only the arrangement and sort order, the Reading Pane is visible by default, and the message header information is grouped on multiple lines. In list views, information appears in columns; the Reading Pane is not displayed by default, but you can display it if you want. To experiment with different views, point to Current View on the View menu, and then click the view option you want.

> **Tip** For one-click access to the various views available in the Mail module, on the View menu, point to Navigation Pane, and then click Current View Pane. (If a check mark appears before the command, this feature is already in use.) You can then switch views by selecting the view option you want from the list.
>
> The Current View pane is displayed by default in the Contacts, Tasks, and Notes modules but not in the Mail and Calendar modules.

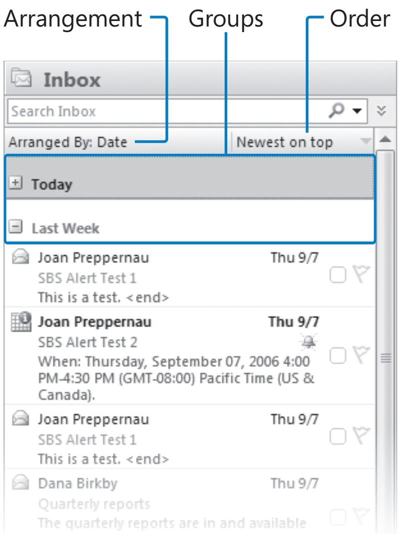
You can also group messages by the contents of any field—by the sender of the message, for example, or by the subject. You can arrange messages by conversation.

By default, Outlook displays messages in the order you receive them, with the newest messages at the top of your Inbox. Messages received during the current week are grouped by day. Earlier messages are grouped by week or by longer periods. You can easily change the order in which messages and other items (such as meeting requests and task assignments) appear in the Inbox or any other mail folder. You can arrange items by:

- **Attachments.** Messages are grouped by whether they have attachments, and secondarily by date received.
- **Category.** Messages are arranged by the category to which they are assigned. Messages without a category appear first. Messages assigned to multiple categories appear in each of those category groups.
- **Conversation.** This grouped view is similar to sorting messages by subject except that each series of related messages is grouped together, and messages within the group appear in a ***threaded*** conversation order. This arrangement is particularly useful when you want to find a response to a specific version of a message in a multi-person ***e-mail trail***. In conversations with multiple messages, Outlook displays only unread or flagged messages, indicating additional messages by a small arrow to the left of the conversation title. Click the arrow to display all the messages in the conversation.
- **Date.** Messages are arranged by date of receipt in order from newest to oldest. Outlook groups messages received on each of the past four days, each of the previous four weeks, the previous month, and those more than one month old.

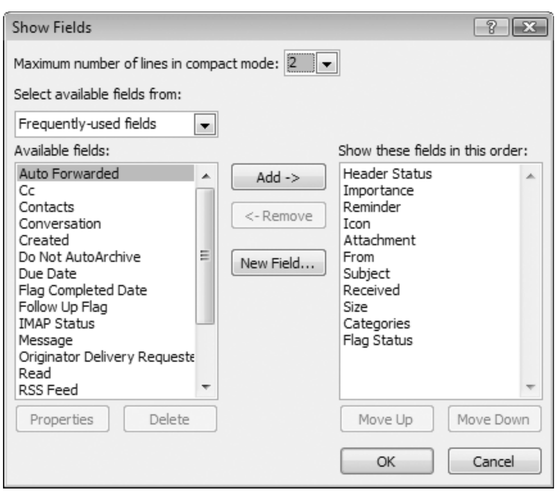
- **E-mail Account.** Messages are grouped by the e-mail account to which they were sent. This is useful if you receive messages for more than one e-mail account in your Inbox (for example, if you receive messages sent to your POP3 account within your Microsoft Exchange Server mailbox).
- **Importance.** Messages are grouped by priority: High (indicated by a red exclamation point), Normal (the default), or Low (indicated by a blue arrow).
- **Recipient (To).** Messages are grouped alphabetically by the primary recipients (the addresses or names on the To line). The group name exactly reflects the order in which addresses appear on the To line. Therefore, a message addressed to *Bart Duncan; Lukas Keller* will not be grouped with a message addressed to *Lukas Keller; Bart Duncan*.
- **Sender (From).** Messages appear in alphabetical order by the message sender's display name. If you receive messages from a person who uses two different e-mail accounts, or who sends messages from two different e-mail clients (for example, from Outlook and from Windows Mail), the messages will not necessarily be grouped together.
- **Size.** Messages are grouped by the size of the message, including any attachment. Groups include Huge (1–5 MB), Very Large (500 KB–1 MB), Large (100–500 KB), Medium (25–100 KB), Small (10-25 KB), and Tiny (less than 10 KB). This feature is useful if you work for an organization that limits the size of your Inbox, because you can easily locate large messages and delete them or move them to a personal folder.
- **Start date or due date.** Unflagged messages and messages without specific schedules appear first. Messages that you've added to your task list with specific start or due dates are grouped by date.
- **Subject.** Messages are arranged alphabetically by their subject lines and secondarily by date. This is similar to arranging by conversation except that the messages aren't threaded.
- **Type.** Items in your Inbox (or other folder) are grouped by the type of item; for example, messages, encrypted messages, message receipts, meeting requests and meeting request responses, tasks, Microsoft InfoPath forms, and server notifications.

When you are viewing messages in a category view, the Arranged By bar in the Inbox header indicates how the messages are arranged and in what order. Clicking the order indicator reverses the order; for example, from Newest On Top to Oldest On Top. Regardless of what order you choose, group headers divide the messages into groups that you can collapse or expand.



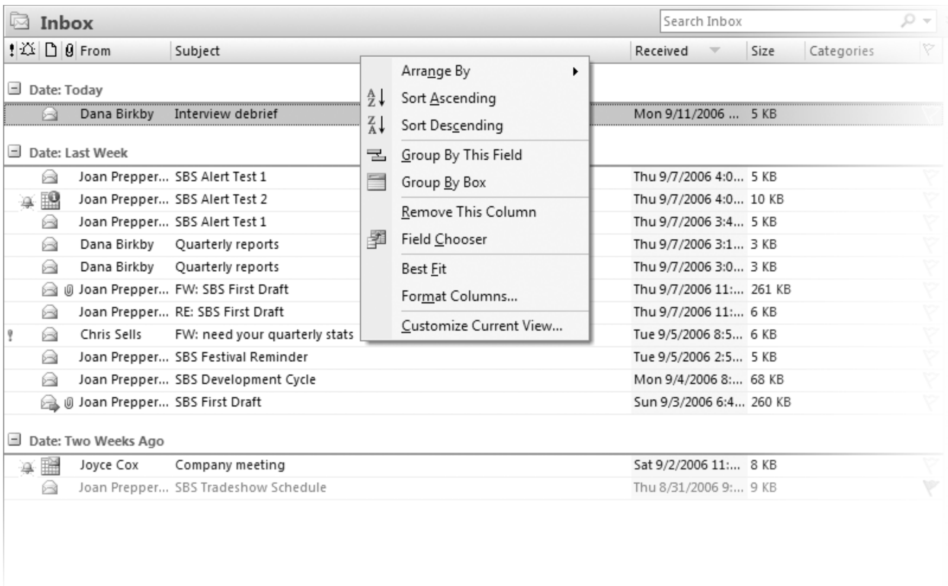
To experiment with the ***arrangement*** options, on the View menu, point to Arrange By, and then click the arrangement option you want.

Regardless of the view and arrangement you choose, you can sort messages by any visible field simply by clicking its column heading (and reverse the sort order by clicking the column heading a second time). You can change the displayed fields from the Show Fields dialog box, which you display by pointing to Arrange By on the View menu, and then clicking Custom.



Outlook displays the selected fields in the order shown in the right column. If displaying all the fields requires more space than is available, only some of the fields will be visible. If necessary, you can change the number of lines shown to accommodate more fields. However, it is likely that one of the standard views will fit your needs.

In a list view, you can control the message arrangement, sorting, grouping, visible fields, and other settings from the context menu that appears when you right-click any column header.



In this exercise, you will change the display, arrangement, sort order, and grouping of messages in your Inbox. Then you will filter the Inbox content, add and remove fields, and change the appearance of the Inbox. Finally, you will restore the default settings. There are no practice files for this exercise.

BE SURE TO display the Inbox in Messages view before beginning this exercise.

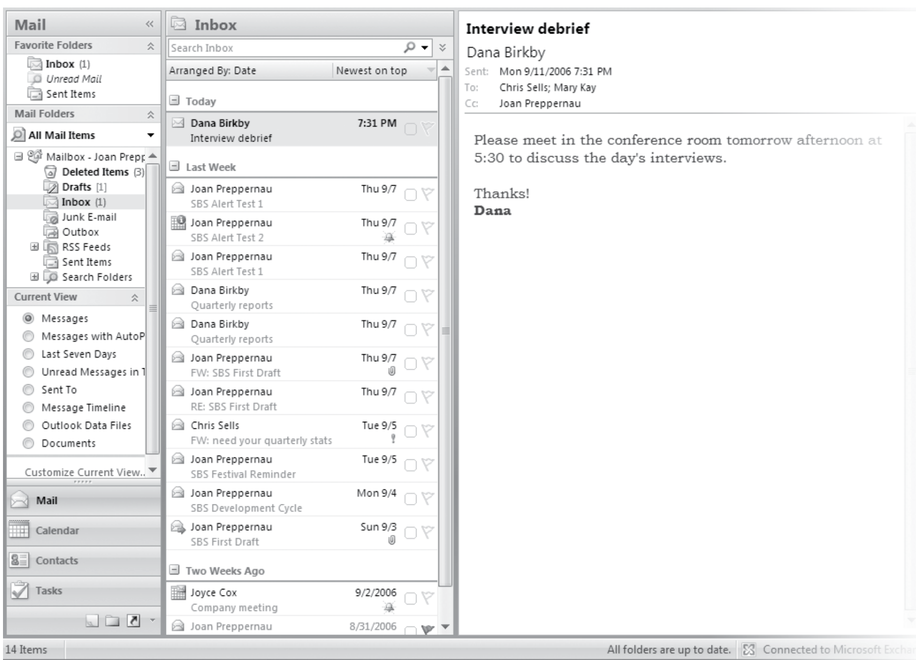
1. If there are no unread messages in your Inbox, right-click a message, and then click **Mark as Unread**.

   The message header will change to bold, and its icon will change from an open envelope to a closed envelope.

> **Tip** Unread items are distinguished from read items by their bold type and closed-envelope icons.

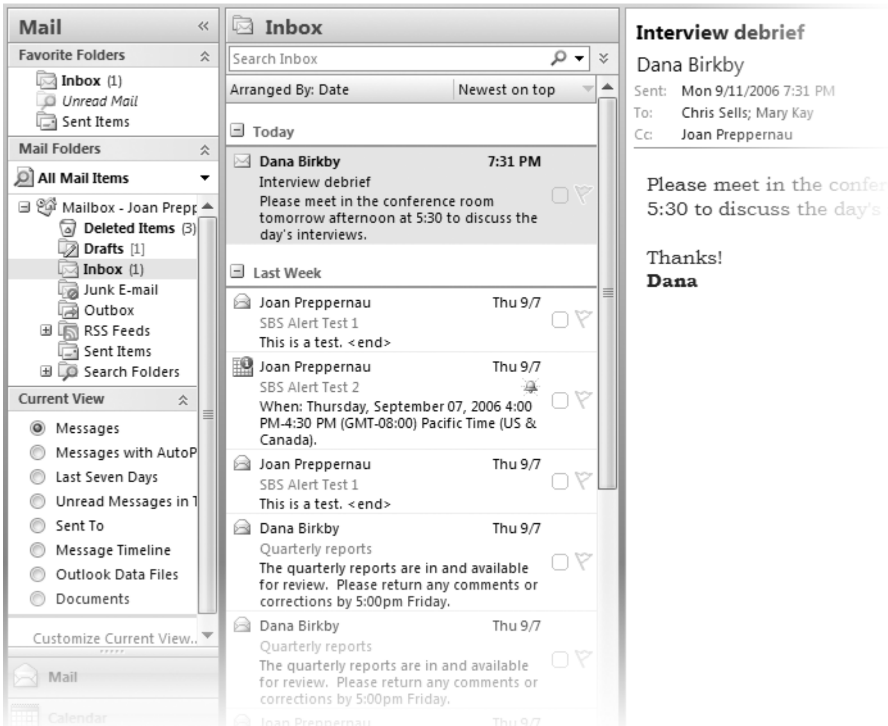
2. On the **View** menu, point to **Navigation Pane**, and then if a check mark doesn't appear to the left of it, click **Current View Pane**.

   The basic view options appear at the bottom of the Navigation Pane.



3. On the **View** menu, if the icon to the left of it is not shaded, click **AutoPreview**.

The first three lines of each unread message appear in the Inbox below the message header.



4. On the **View** menu, point to **Arrange By**, and then click **From**.

   Outlook rearranges and groups the messages in your Inbox alphabetically by sender.

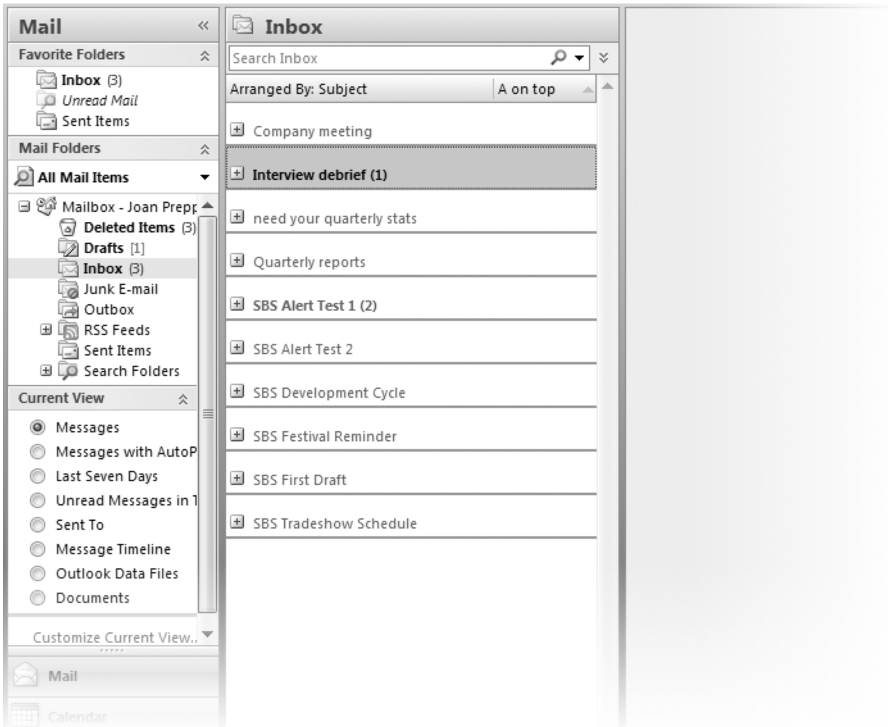
5. In the Inbox header, click **A on Top**.

   Outlook reverses the order of the messages.

6. In the Inbox header, click the **Arranged By** bar, and then click **Subject**.

   Outlook groups the messages by subject.

7. On the **View** menu, point to **Expand/Collapse Groups**, and then click **Collapse All Groups**.



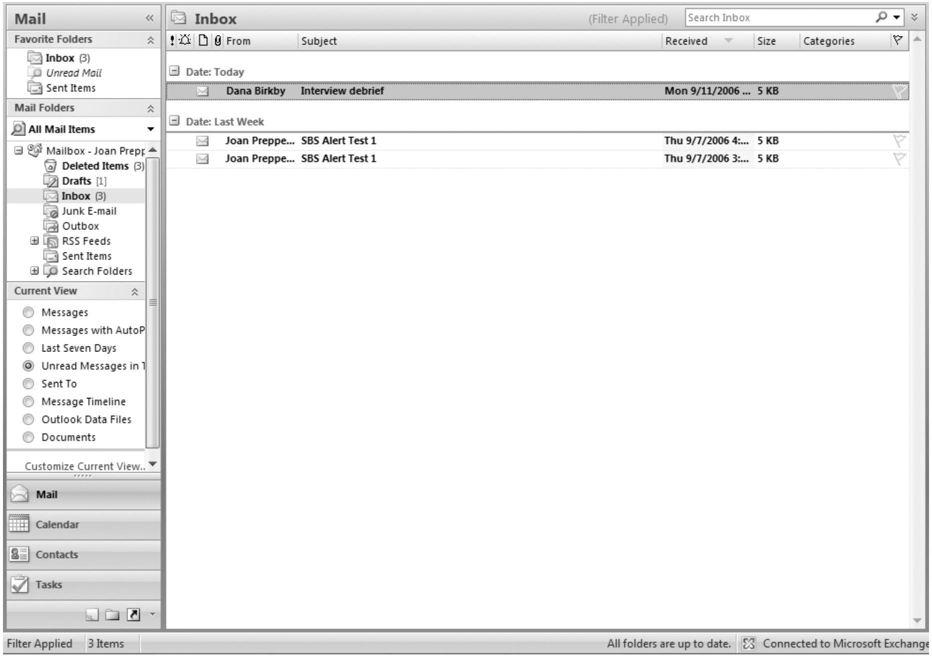
Notice that the number of unread items in each group (if there are any) is indicated in parentheses following the conversation subject.

You can use this method to expand or collapse all groups. You can expand or collapse individual groups by clicking the Expand (+) or Collapse (-) button to the left of the group name. You can collapse the group containing the currently selected item by pressing the Left Arrow key and expand a selected group by pressing the Right Arrow key.

8. In the **Current View** pane, click **Unread Messages in This Folder**.

Outlook filters the Inbox to display only unread messages.

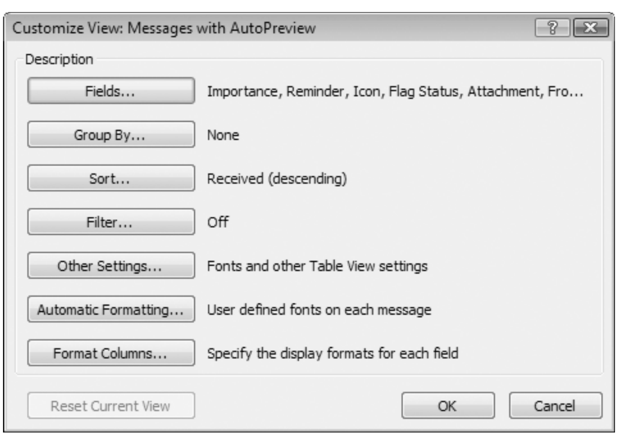
The Inbox header and the status bar indicate that a filter has been applied. (If you have no unread messages in your Inbox, it will appear to be empty.)



9. In the **Current View** pane, click **Messages with AutoPreview**.

   Outlook removes the filter and displays a list view of the messages, with the first lines of each unread message visible.

10. Experiment with the available arrangement, sorting, and grouping options if you want. Then on the **View** menu, point to **Current View**, and click **Customize Current View**.



> **Tip** If the Reset Current View button at the bottom of the Customize View dialog box is active, your view is currently customized and you can reset the view to its default settings by clicking the button.

11. In the **Customize View** dialog box, click **Fields**.

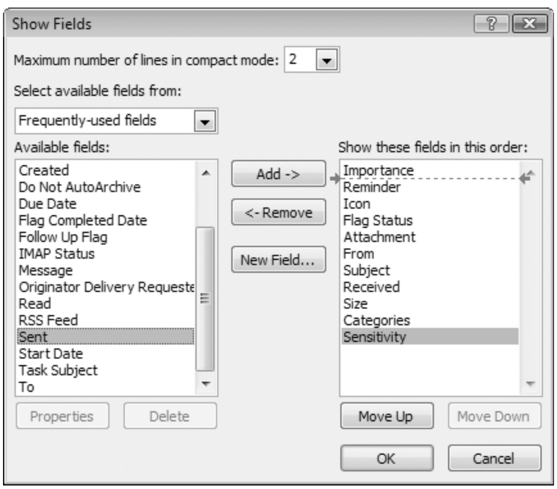
    The Show Fields dialog box (shown earlier) opens.

12. In the **Available fields** list, click **Sensitivity**, and then click **Add**.

    The Sensitivity field moves to the bottom of the list of columns to be shown in this view.

13. In the **Show these fields in this order** list, drag **Sensitivity** to appear below **Importance**.

    While you drag the field, red arrows indicate where it will appear when you release the mouse button.

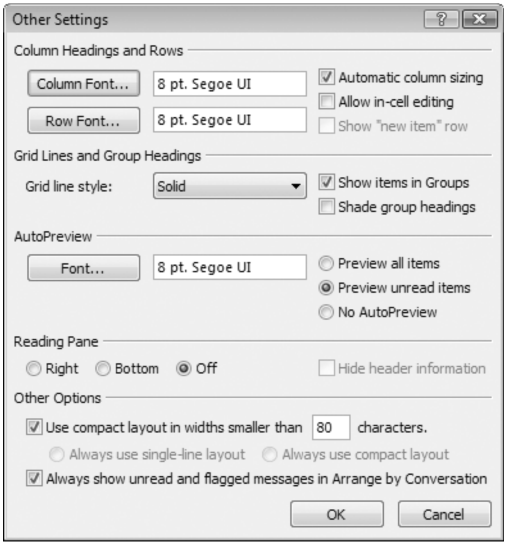


14. In the **Show Fields** dialog box, click **OK**.

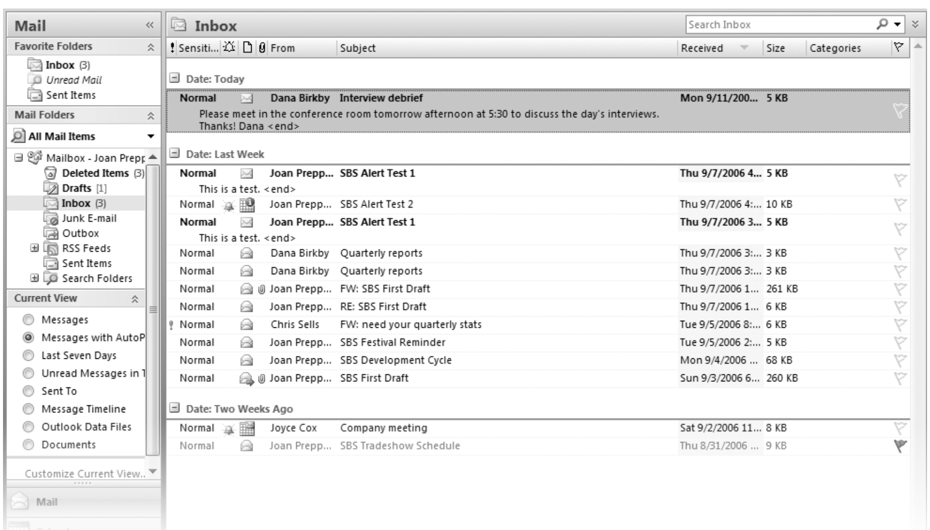
> **Tip** To change the order of columns in any list view, simply drag the column headings to the locations you prefer. While you are dragging a column heading, red arrows indicate where the column will appear when you release the mouse button.

15. In the **Customize View** dialog box, click **Other Settings**.

The Other Settings dialog box opens.



16. In the **Grid Lines and Group Headings** area, click the **Grid line style** arrow, and then in the list, click **Small dots**. Then click **OK** in each of the two open dialog boxes to return to the Inbox, which displays the new view settings.

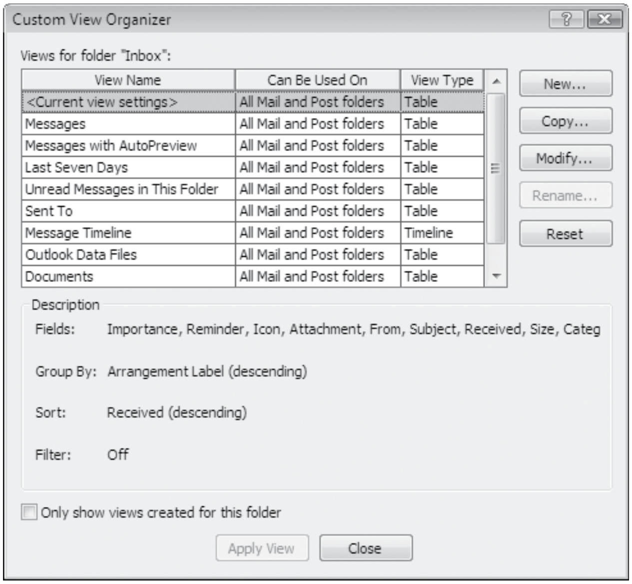


17. Drag the **Sensitivity** column heading downward into the message list, and release the mouse button when a large black X appears over the heading.

Outlook removes the Sensitivity column from the view.

18. On the **View** menu, point to **Current View**, and then click **Define Views**.

The Custom View Organizer dialog box opens, with the current view selected.



19. In the **Custom View Organizer** dialog box, click **Reset**. In the **Microsoft Office Outlook** message box asking whether you want to reset the current view to its original settings, click **OK**.

20. In the **View Name** list, click each view in turn.

If the view settings have been changed from the default, the Reset button becomes active.

21. Repeat step 19 to reset any customized views you want. When you finish, click the **Messages** view, and then click **Apply View**.

The Inbox is restored to its default view.

BE SURE TO restore the default view settings before continuing, if you want them to match those shown in the rest of this part of the book.

Using Search Folders

A Search Folder is a *virtual folder* that displays all the messages in your mailbox that match a specific set of search criteria, no matter which folders the messages are actually stored in. When you create a Search Folder, it becomes part of your mailbox and is kept up to date. The Search Folder module is located in the All Mail Items list under your top-level mailbox, at the same level as the Inbox.

Depending on the contents of your Inbox and your previous use of Outlook, you might have any of the following four folders within the Search Folders folder:

- The Categorized Mail folder displays messages assigned to a category.
- The For Follow Up folder displays messages flagged for future action.
- The Large Mail folder displays messages larger than 100 kilobytes (KB).
- The Unread Mail folder displays messages that are marked as unread.

The names of folders containing unread items are bold, followed by the number of unread items in parentheses. The names of folders containing items flagged for follow up are bold, followed by the number of flagged items in square brackets. The names of folders whose contents are not up to date are italic. To update a Search Folder, click the folder name.

Each message in your mailbox is stored in only one folder (such as your Inbox), but it might appear in many Search Folders. Changing or deleting a message in a Search Folder changes or deletes the message in the folder where it is stored.

If you want quick access to messages that fit a specific set of criteria, you can create a custom Search Folder. To do so:

1. In the **Navigation Pane**, expand the **Search Folders** folder to display the default Search Folders.
2. Right-click the **Search Folders** folder, and then click **New Search Folder**.
3. In the **New Search Folder** dialog box, select the type of Search Folder you want to create, and then click **OK**.

   You can choose from the standard options presented or click Custom to specify other search options.

You can make changes to the contents of an existing Search Folder by right-clicking the folder and then clicking Customize This Search Folder.

Organizing Messages by Using Color Categories

Assigning messages to categories can help you more easily locate information. Outlook 2007 introduces the Color Categories feature, which combines named categories with color bars to provide an immediate visual cue when viewing messages in your Inbox.

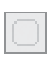
You can apply color categories to messages, calendar items, contacts, tasks, and notes. You can apply color categories several ways:

Categorize

- In any folder, you can select one or more items, click the Categorize button on the Standard toolbar, and then click the category you want.

> **Troubleshooting** The Categorize button might not appear on the toolbar until you select one or more items.

- In any folder, you can right-click one item or a selection of multiple items, point to Categorize, and then click the category you want.



Category bar

- In any mail folder, you can right-click the Category bar that appears when the Reading Pane is displayed, and then click the category you want.
- If you frequently use a particular category, you can assign it as your Quick Click category. You can then apply the Quick Click category to a message by clicking its Category bar.

To quickly view the messages belonging to a category, you can group your messages by category or include the category as a search criterion in the Query Builder. On the To-Do Bar, you can arrange your flagged messages and tasks by category.

> **Tip** To help you easily distinguish messages received from certain people, you can color-code message headers. For example, you might show all messages from your boss in red and all messages from the finance department in green. You can also choose to have messages that were sent only to you displayed in a different color than messages sent to multiple people or a distribution list. You apply color-coding on a per-folder basis. To experiment with color-coding, click Organize on the Tools menu, and then click the Using Colors tab.

In this exercise, you will display the default color categories, rename and create categories, change the color associated with a category, categorize a message, and sort the Inbox contents by category.

USE any message in your Inbox.
BE SURE TO display your Inbox in the default Messages view before beginning this exercise.

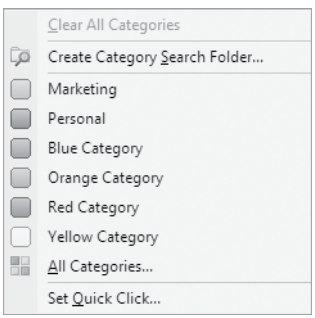
1. In the Inbox, click the message you want to assign to a category.


Categorize

2. On the **Standard** toolbar, click the **Categorize** button.

   Troubleshooting If the Categorize button is not visible or active, click any message in the Inbox to activate it.

   The Category list displays the standard and currently assigned categories. Notice that you can remove all categorizations from a message by clicking Clear All Categories.



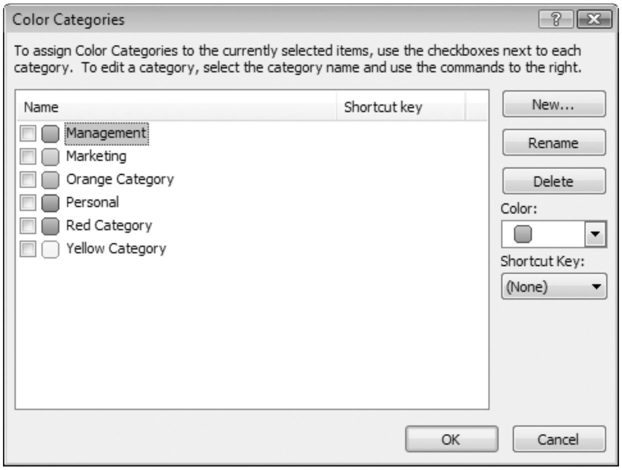
3. In the **Category** list, click **All Categories**.

   The Color Categories dialog box opens, displaying the current color-to-category assignments. You can rename any of the standard color categories or create new color categories.

4. In the **Color Categories** dialog box, click the **Blue Category** name (not the check box), and then click **Rename**. With the category name selected for editing, type Management, and then press the Enter key.

   Tip If you haven't renamed a color category, Outlook gives you the option of renaming the category the first time you use it.

The category name changes.



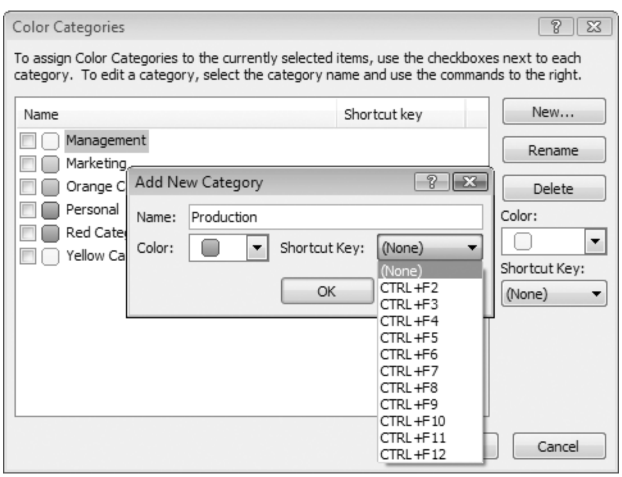
5. With the **Management** category still selected, click the **Color** arrow, and then in the color palette, click the **Yellow** square.

   The color associated with the Management category changes from Blue to Yellow.

6. In the **Color Categories** dialog box, click **New**.

   The Add New Category dialog box opens.

7. In the **Name** box, type **Production**. Click the **Color** arrow, and then in the color palette, click the **Red** square. Then click the **Shortcut Key** arrow.



You can assign keyboard shortcuts to up to 11 color categories. You might want to implement this feature if you frequently use multiple categories.

8. In the **Shortcut Key** list, click **None**. Then in the **Add New Category** dialog box, click **OK**.

   The new category appears at the bottom of the Color Categories list. Its check box is selected, indicating that it has been assigned to the currently selected message.

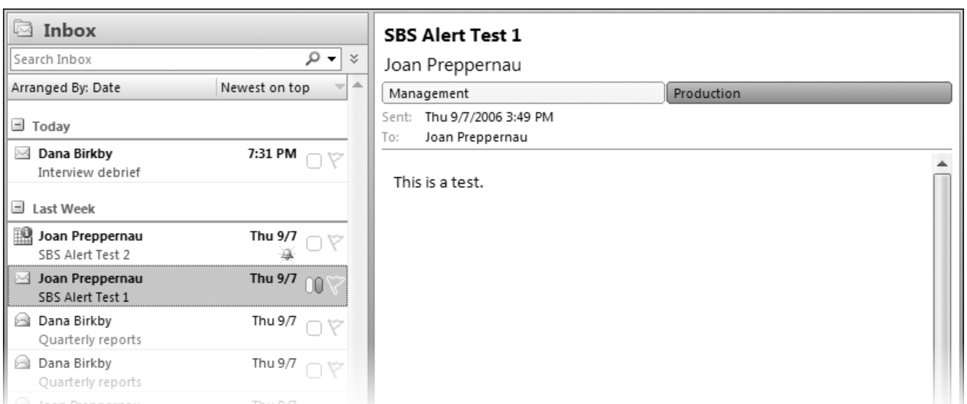
9. In the **Color Categories** dialog box, click **OK**.

   In the message list, a red square appears in the Category bar of the selected message, and in the Reading Pane, a red bar with the category name *Production* appears at the top of the message.

10. In the message list, right-click the **Category** bar of the message assigned to the Production category, and then in the list, click **Management**.

    The Category bar changes to display both red and yellow icons, indicating that the message is assigned to two categories. You can assign a message to an unlimited number of categories, but only the three most recently assigned appear in the Category bar.

    The Reading Pane displays two colored bars of equal size. Up to three categories can be displayed in one row; additional categories are displayed in additional rows.

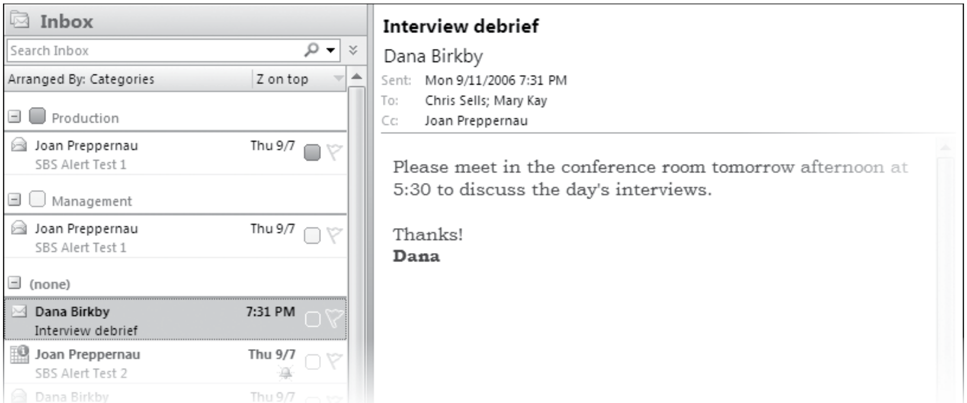


11. In the Inbox header, click the **Arranged By** bar, and then click **Categories**.

    The messages are arranged by category, beginning with the uncategorized messages.

12. To the right of the **Arranged By** bar, click **A on top**.

    The order reverses to display the categorized messages at the top of the list.



BE SURE TO sort the Inbox by date before continuing to the next exercise.

Organizing Messages in Folders

After you've read and responded to messages, you might want to keep some for future reference. You can certainly choose to retain them all in your Inbox if you want, but as the number of messages in your Inbox increases to the hundreds and then into the thousands, it might quickly become overwhelming. To keep your Inbox content low and avoid an accumulation of unrelated messages, you can organize messages into folders.

Popular personal-organization gurus advocate various folder structures as an important part of an organizational system. You can apply any of these physical folder structures to Outlook, or you can use any other structure that works for you. For example, you might create a folder for each project you're working on and store all messages regarding a particular project in its own folder. Or you might create a folder to store all messages from a particular person, such as your manager, no matter what they are about.

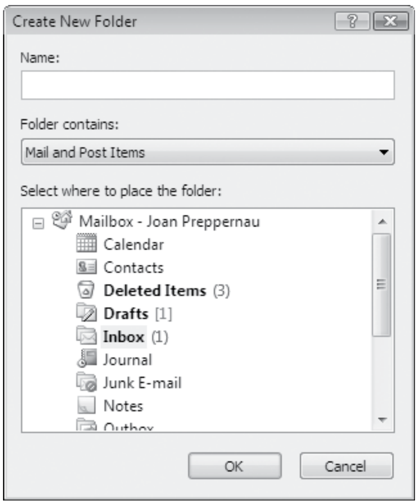
You can move messages to folders manually, or if your organization is running Exchange Server, you can have Outlook move them for you. You can automatically move messages to another folder by creating a rule; for example, you can instruct Outlook to automatically move all messages received from your manager to a separate folder. You can set up different rules that go into effect when you're away from the office.

In this exercise, you will create a folder and then move messages to it.

USE any messages in your Inbox.
BE SURE TO display your Inbox in Messages view before beginning this exercise.

1. On the **Standard** toolbar, click the **New** arrow, and then in the list, click **Folder**.

   The Create New Folder dialog box opens.

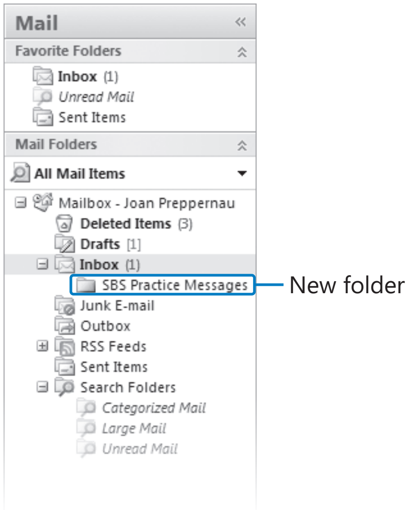


Troubleshooting If your default data file (the file where your messages are stored) is a personal folder on your hard disk, the first item in the Select Where To Place The Folder box is Personal Folders.

2. In the **Name** box, type SBS Practice Messages, and then click **OK**.

Important The name of this folder begins with *SBS* so that you can easily differentiate it from other folders in your mailbox.

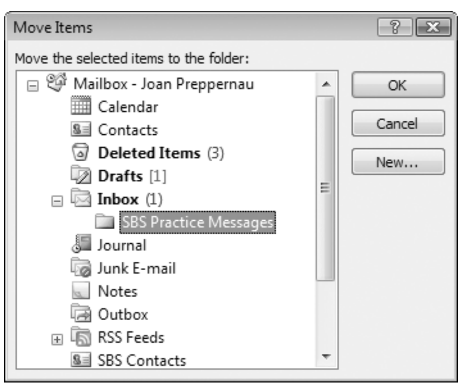
Because you created this folder from the Inbox, Outlook creates the new folder as a subfolder of the Inbox and formats it to contain mail items.



3. In the message list, locate two messages that you want to move to the new folder.
4. Drag the first message to the **SBS Practice Messages** folder in the **Navigation Pane**.

   The message disappears from the Inbox.
5. Right-click the second message, and then click **Move to Folder**.

   The Move Items dialog box opens.

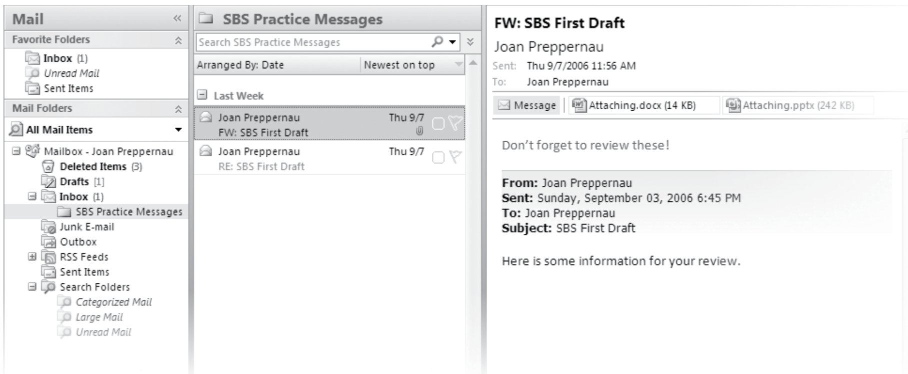


6. In the **Move the selected items to the folder** list, click **SBS Practice Messages** (if it isn't already selected). Then click **OK**.

   The message disappears from the Inbox.

7. In the **Navigation Pane**, under the **Inbox** folder, click the **SBS Practice Messages** folder.

   The two messages appear in the new folder.



BE SURE TO move the messages back to your Inbox if you used your own messages rather than practice messages you have created for these exercises.

Creating a OneNote Page from an E-Mail Message

If your 2007 Office system installation includes Microsoft Office OneNote, you can send or link items you create in Outlook, such as e-mail messages, contact records, and meeting invitations, to your OneNote notebook.

To send the content of an e-mail message to OneNote:

1. Display the Inbox, and then select the message (or messages) you want to send.
2. On the **Standard** toolbar, click the **Send to OneNote** button.

   OneNote starts and, for each selected message, creates a page in your Unfiled Notes section. Each page contains the full text of the original message and links to any attachments.

You can move pages from the Unfiled Notes section to a notebook section by dragging it, or by right-clicking the page tab, and then clicking Move Page To, Another Section, and the target notebook section.

Archiving Messages

As messages accumulate in your Inbox and other message folders, you might need to consider other ways to store them in order to cut down on the amount of storage space you're using. For example, you might want to ***archive*** all messages received or sent before a certain date. Archiving messages in a separate Outlook message file helps you manage clutter and the size of your primary data file, while still allowing easy access to the archived messages from within Outlook.

By default Outlook automatically archives messages in all your folders at regular intervals to a location determined by your operating system—usually an Archive data file you can access from the Navigation Pane. You can change the default ***AutoArchive*** settings, such as the archive frequency and location, and you can specify unique archive settings for individual folders.

If you are working on an Exchange Server network, your archival options might be limited by retention policies set by your network administrator. For instance, your company might have a policy that you may retain items for no more than a certain number of days.

> **Tip** You can use the Mailbox Cleanup feature to see the size of your mailbox, find and delete old items or items that are larger than a certain size, manually archive your mail, empty your Deleted Items folder, and delete conflicting versions of items stored on your computer or on the server. To use this feature, click Mailbox Cleanup on the Tools menu.

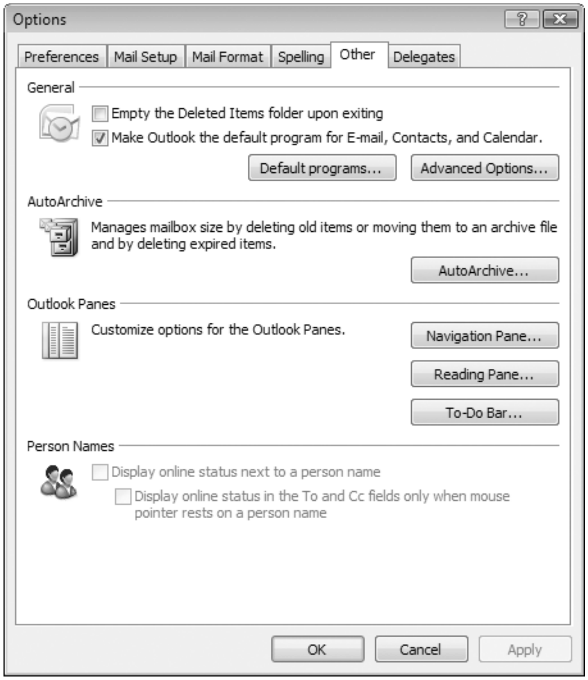
In this exercise, you will learn how to set the default automatic archive options, how to manually archive a folder, and how to set the archive options for an individual folder. There are no practice files for this exercise.

> **BE SURE TO** display the Inbox before beginning this exercise.

1. On the **Tools** menu, click **Options**.

   The Options dialog box opens.

2. In the **Options** dialog box, click the **Other** tab.



3. In the **AutoArchive** area, click **AutoArchive**.

The AutoArchive dialog box opens.

4. Review your AutoArchive settings—particularly note how often Outlook will start the archival process, the age at which items will be archived, and the location in the **Move old items to** box.

   If the Prompt Before AutoArchive Runs check box is selected, Outlook requests your approval each time it runs the AutoArchive process. If you decline, the process doesn't start again until the next scheduled time.

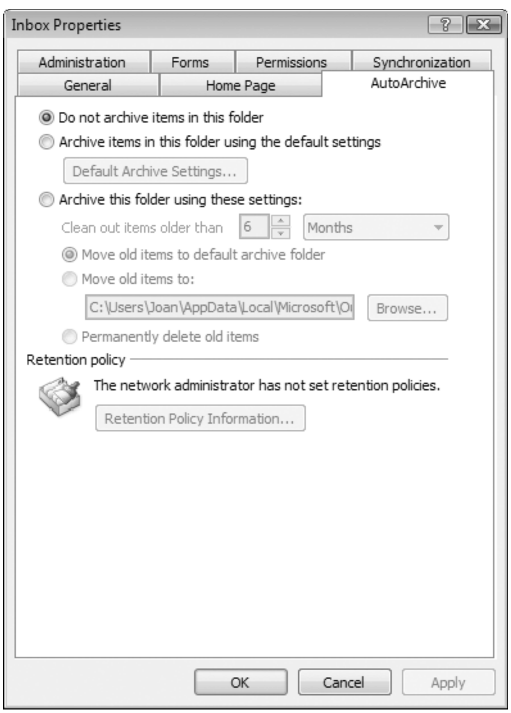
   Notice that you have the option to permanently delete old items. If you make changes to your AutoArchive settings or want to standardize settings across all folders, you can apply the changes to all the folders in your mailbox by clicking the Apply These Settings To All Folders Now button.

5. If you want to make changes to your AutoArchive settings, do so, and then click **OK** in each of the open dialog boxes. Otherwise, click **Cancel** in each of the dialog boxes to close them without initiating any changes.

6. With the Inbox active, on the **File** menu, point to **Folder**, and then click **Properties for "Inbox"**.

   The Inbox Properties dialog box opens.

7. Click the **AutoArchive** tab.

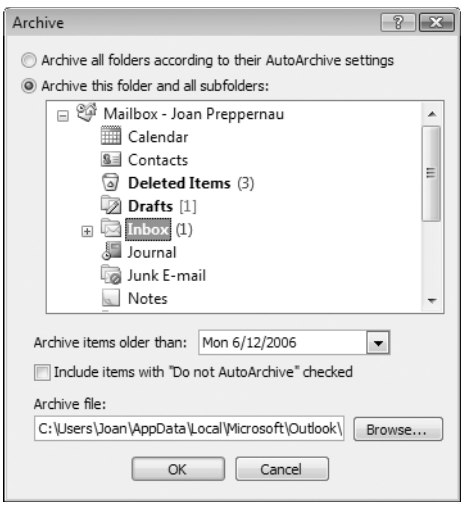


You can set the archive options for each folder individually from the AutoArchive tab of the folder's Properties dialog box, as follows:

- If you click Archive Items In This Folder Using The Default Settings, you can view and modify the default settings in the AutoArchive dialog box shown earlier by clicking the Default Archive Settings button.
- If you click Archive This Folder Using These Settings, you can specify a unique archival age and location for the items in this folder.

8. If you want to make changes to the Inbox AutoArchive settings, do so, and then click **OK**. Otherwise, click **Cancel** to close the dialog box without initiating any changes.
9. On the **File** menu, click **Archive**.

   The Archive dialog box opens.



   From this dialog box, you can manually start the archive process for your entire mailbox or for selected folders.

10. If you want to initiate the archive process for your mailbox now, click **Archive all folders according to their AutoArchive settings**, and then click **OK**. Otherwise, click **Cancel**.

   If you click OK, Outlook displays the progress of the archive process on the status bar in the lower-right corner of the program window. You can cancel an archive process by clicking the Archiving button on the status bar and then in the list, clicking Cancel Archiving.

The first time Outlook archives messages, it creates an Archive Folders data file that you can access from the Navigation Pane. The data file contents are organized in the same folder structure as the original contents and are stored in a separate file on your computer.

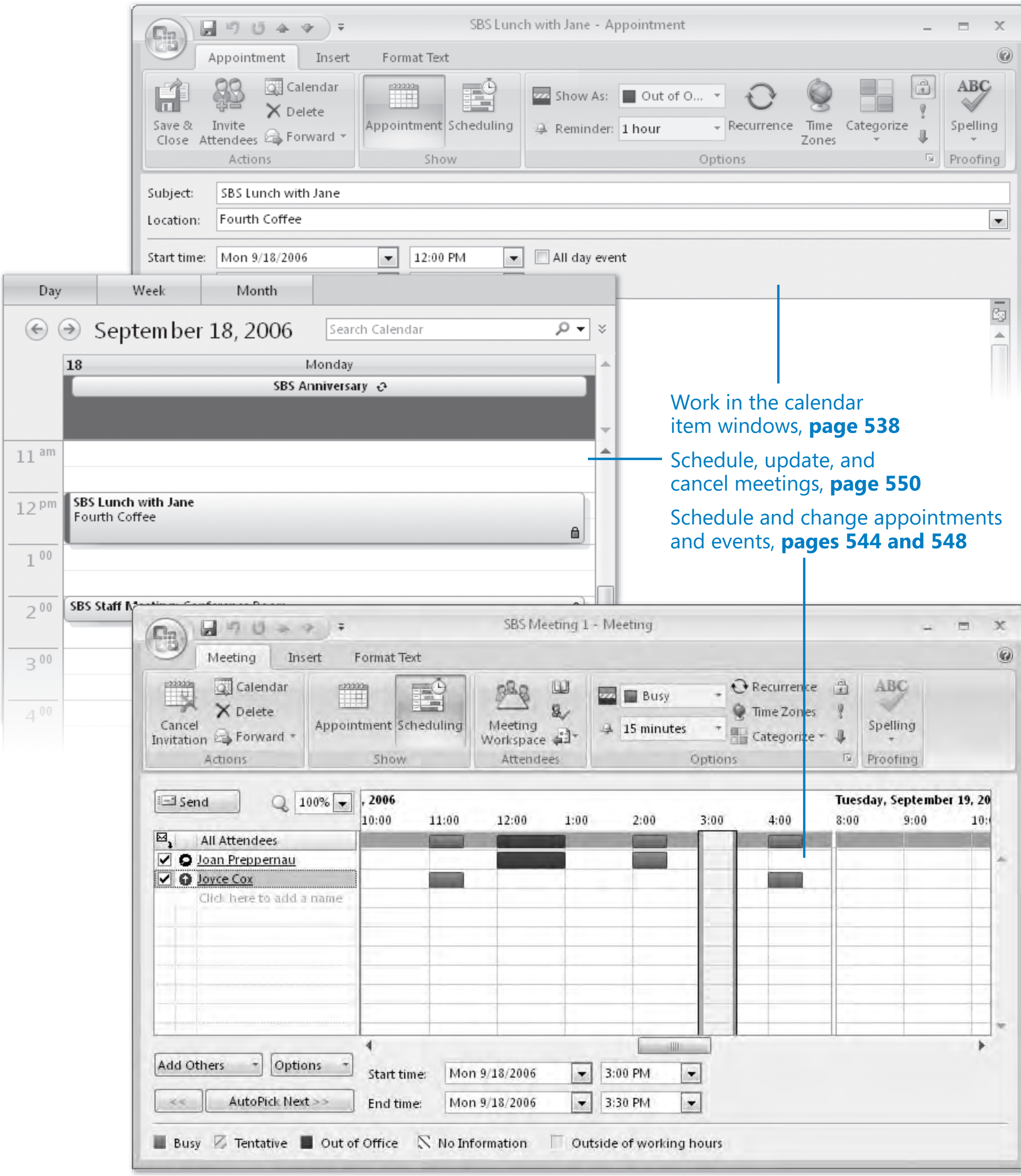
Tip You can restore archived Outlook items from the Archive Folders data file to your mailbox by dragging or moving them to the mailbox folder.

BE SURE TO review your AutoArchive settings and ensure they are set the way you want.

Key Points

- You can filter and locate messages in your mailbox by using the new Instant Search function. You can create virtual Search Folders that automatically update to display messages meeting certain criteria.
- You can group and sort messages by sender, time, subject, size, category, or any other field.
- You can assign color-coded categories to messages, tasks, appointments, and other Outlook items, and then group and sort items by color category. You can use the default Outlook categories or tailor them to fit your needs.
- You can create folders to organize your mail, and you can move items to folders manually or automatically.
- Outlook automatically archives old and expired items to a separate data file. You can specify the AutoArchive frequency, location, and other settings on a global and per-folder basis.

Chapter at a Glance



Work in the calendar item windows, **page 538**

Schedule, update, and cancel meetings, **page 550**

Schedule and change appointments and events, **pages 544 and 548**

19 Managing Appointments, Events, and Meetings

In this chapter, you will learn to:

- ✔ Work in the calendar item windows.
- ✔ Schedule and change appointments and events.
- ✔ Schedule, update, and cancel meetings.
- ✔ Respond to meeting requests.

You might find that your Microsoft Office Outlook Calendar runs your life—but that isn't necessarily a bad thing! Using the Calendar effectively can help you to stay organized, on task, and on time. You can schedule and track appointments, meetings, and events. Because Outlook 2007 maps your scheduled tasks to your calendar, you can look at your calendar in Day view or Week view to see the tasks that need to be completed that day or that week, and you can track your progress by marking tasks as complete when you finish them.

In this chapter, you will record different types of information in your Outlook calendar, scheduling an appointment and an event on your own calendar and then scheduling a meeting with another person. You will learn methods of determining meeting times during which other people are available. Then you will learn about responding to, updating, and canceling meeting requests.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important No practice files are required to complete the exercises in this chapter. For more information about practice files, see "Using the Companion CD" at the beginning of this book.

Working in the Calendar Item Windows

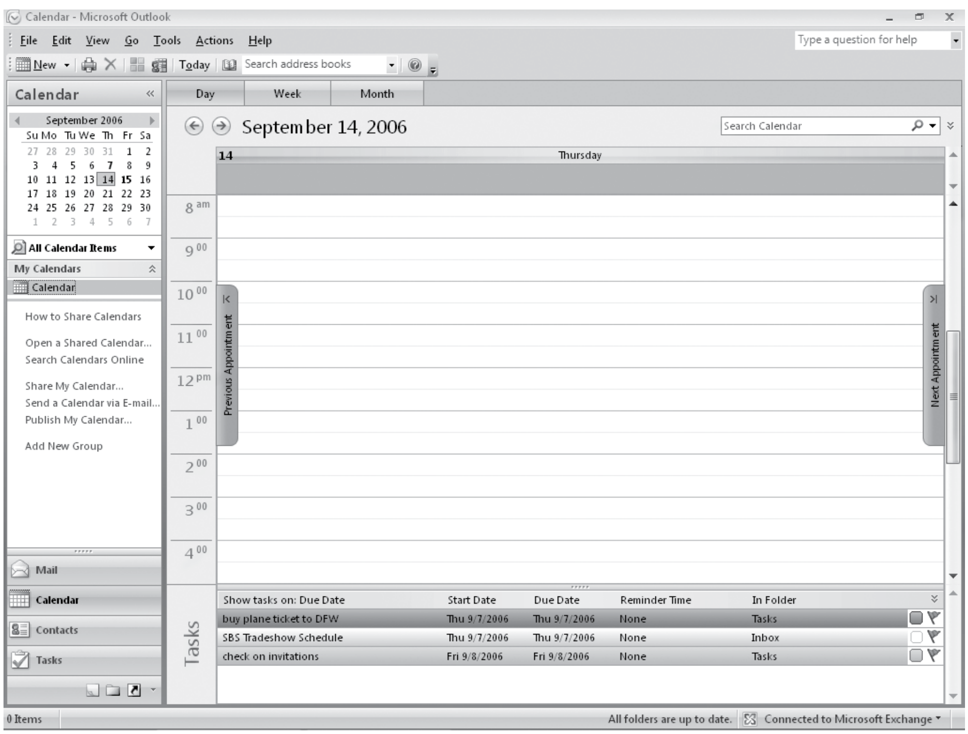
We refer to the window in which you create or respond to an appointment as the *appointment window*, to a meeting as the *meeting window*, and to an event as the *event window*; collectively we refer to these windows as the *calendar item windows*. Like the contact and message windows, the calendar item windows contain their own commands, arranged on the new Office Ribbon instead of on menus and toolbars.

In this exercise, you will take a tour of the calendar item window elements, and you'll learn about the differences between the types of calendar items. There are no practice files for this exercise.

BE SURE TO start Outlook before beginning this exercise.


Calendar

1. In the **Navigation Pane**, click the **Calendar** button to display the Calendar module.

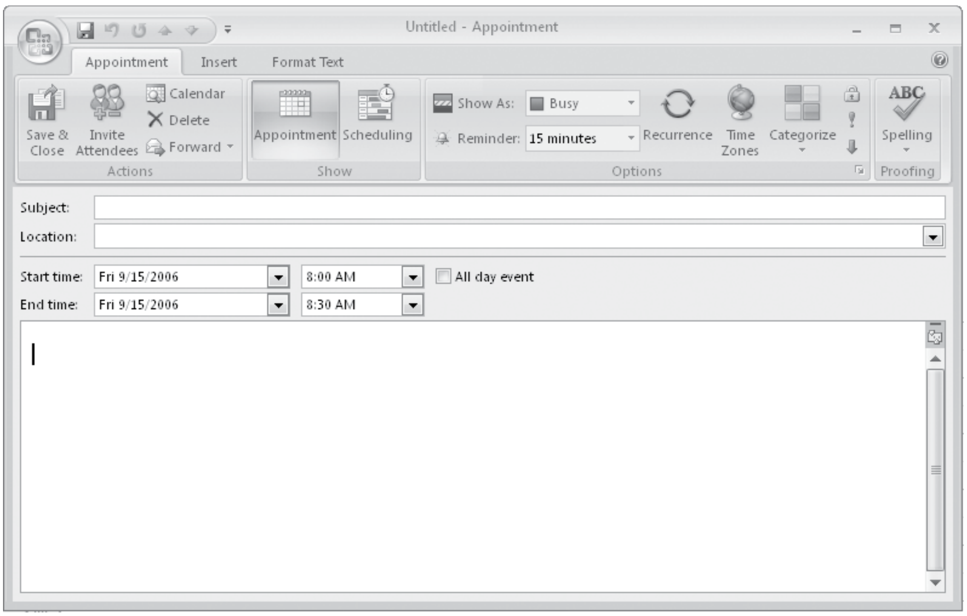


> **Troubleshooting** Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

New Appointment

2. On the **Standard** toolbar, click the **New Appointment** button.

   An untitled appointment window opens.

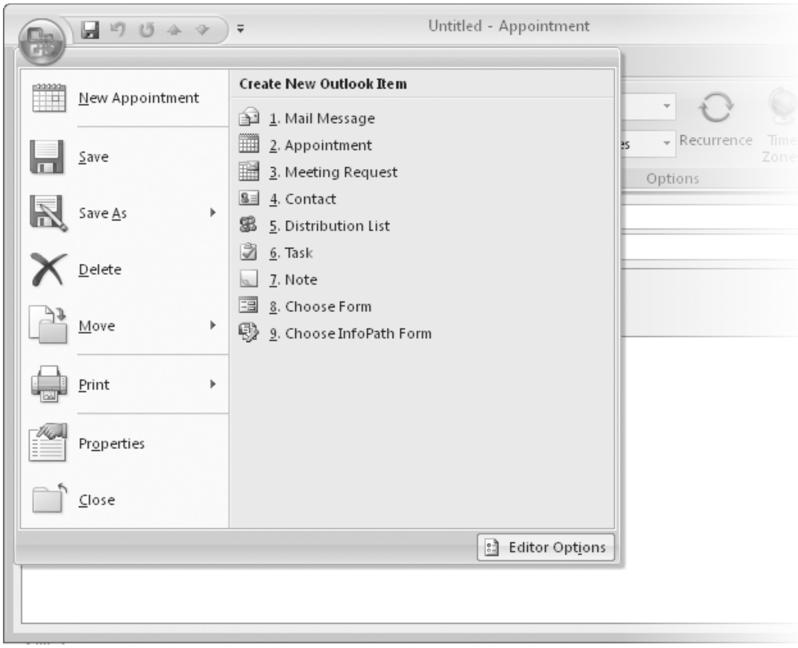


> **Important** Depending on your screen resolution and the size of the appointment window that opens, you might see more or fewer buttons in each of the groups, or the buttons you see might be represented by larger or smaller icons than those shown in this book. Experiment with the size of the appointment window to understand the effect on the appearance of the Ribbon.

Microsoft Office Button

3. In the upper-left corner of the window, click the **Microsoft Office Button**.

   Commands related to managing appointments (such as creating, saving, deleting, and printing) are available from the Office menu that appears.



4. Click away from the **Office** menu to close it.

The appointment window commands are organized in groups on three tabs:

- Appointment
- Insert
- Format Text

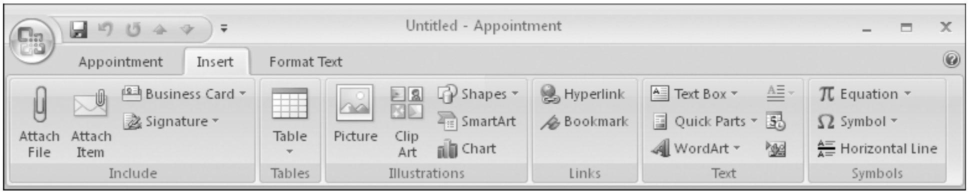
> **Tip** Depending on what programs you have installed on your computer, tabs and groups other than those described here might also appear on the Ribbon. For example, if Microsoft Office OneNote is installed on your computer, a OneNote group appears on the Appointment tab.

The Appointment tab is active by default. Buttons representing commands related to creating appointments are organized on this tab in four groups:

- Actions
- Show
- Options
- Proofing

You can create a simple appointment by using only the commands available on this tab.

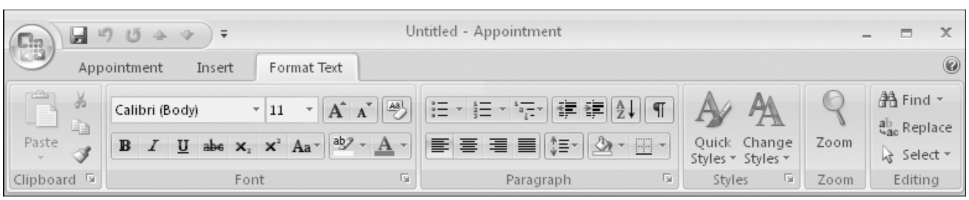
5. Click the **Insert** tab.



Buttons representing commands related to items you can insert are organized on this tab in six groups:

- Include
- Tables
- Illustrations
- Links
- Text
- Symbols

6. Click the **Format Text** tab.

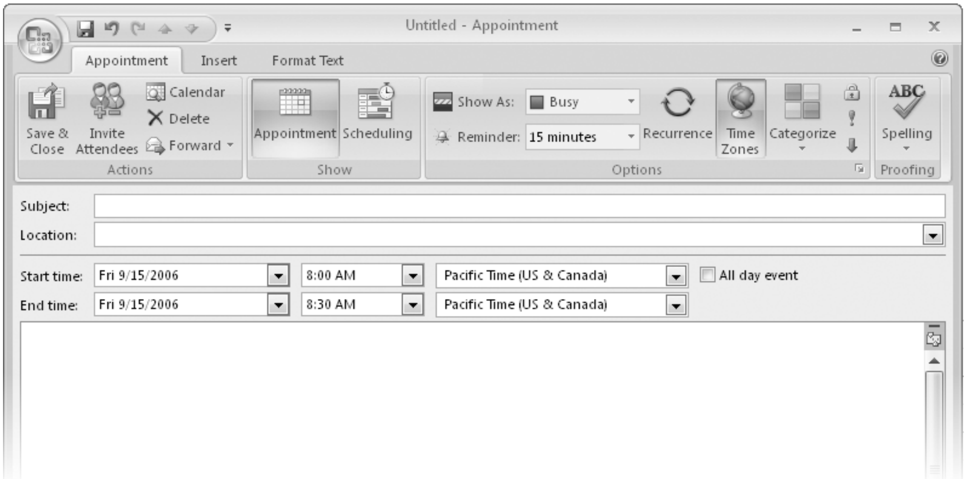


Buttons representing commands related to the appearance of message content are organized on this tab in six groups:

- Clipboard
- Font
- Paragraph
- Styles
- Zoom
- Editing

7. On the **Appointment** tab, in the **Options** group, click the **Time Zones** button.

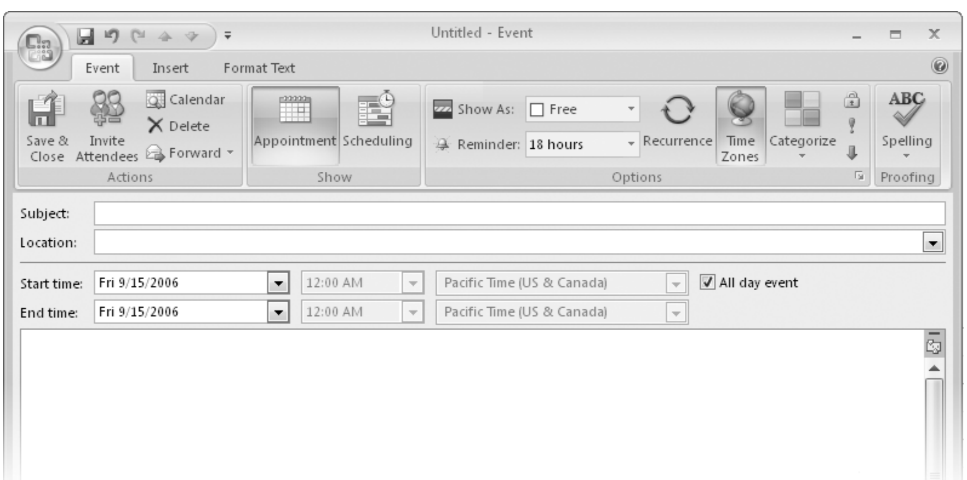
   A new field displaying the time zone for each of the start and end times appears. With this useful Outlook 2007 feature, you can schedule an appointment that crosses time zones—for example, a flight from Los Angeles to New York.



8. In the **Start time** area, click **All day event**.

   The window changes from an appointment window to an event window. The contents of the Format Text and Insert tabs don't change, but an Event tab replaces the Appointment tab.

9. Click the **Event** tab.

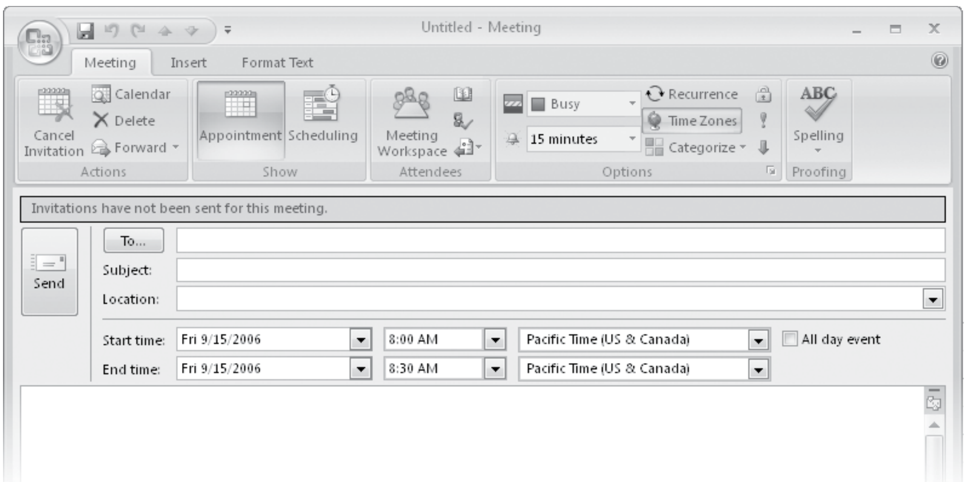


The Event tab contents are nearly identical to the Appointment tab contents—the only change is that on the Event tab, in the Options group, by default your time is shown as Free rather than Busy, and the reminder is set to display 18 hours prior to the event rather than 15 minutes.

10. In the **Start time** area, clear the **All day event** check box to change the event to an appointment.

11. In the **Actions** group, click the **Invite Attendees** button.

The window changes from an appointment window to a meeting window. The contents of the Format Text and Insert tabs don't change, but a Meeting tab that includes one additional group, Attendees, replaces the Appointment tab:



Tip You can invite people to an event in the same way you do to a meeting, by clicking the Invite Attendees button from within an event window.

The meeting window header includes a To field in addition to the standard Subject and Location fields. You can invite attendees by entering them in the To field or by clicking the Scheduling button in the Show group.

BE SURE TO click the Time Zones button to hide the time zone settings, if you don't want to display them.

CLOSE the meeting window without saving your changes.

Scheduling and Changing Appointments

Appointments are blocks of time you schedule for only yourself (as opposed to meetings, to which you invite other people). If an appointment recurs at specific intervals, such as every Tuesday and Thursday, every other week or every month, you can set it up in your Outlook calendar as a ***recurring*** appointment; doing so creates multiple instances of the appointment in your calendar at the time interval you specify. Recurring appointments are linked. When making changes to recurring appointments, you can choose to update all occurrences or only an individual occurrence of the appointment.

When creating an appointment, you can show your time on the calendar as Free, Tentative, Busy, or Out Of Office. This information is available to other people on your network, and also when you send your schedule information to other people in an e-mail message or share your calendar. You can include information such as driving directions or Web site links in the Notes field, and attach related files so that they are easily available to you at the time of the appointment.

See Also For information about sending your schedule information via e-mail, see "Sending Calendar Information in an E-Mail Message" in Chapter 20, "Managing Your Calendar."

When Outlook is running, it displays a ***reminder*** message 15 minutes before the appointment start time—you can change the reminder time or turn it off completely if you want to. If you synchronize your Outlook installation with a mobile device such as a BlackBerry or a mobile phone running Windows Mobile, you can also receive reminders on your device. This is very convenient when you are away from your computer.

See Also For information about assigning appointments to categories, see "Organizing Messages by Using Color Categories" in Chapter 18, "Managing Your Inbox."

In this exercise, you will schedule an appointment and a recurring appointment. There are no practice files for this exercise.

> **Troubleshooting** The default Calendar display is Day view. If your calendar does not look like the one shown in this exercise, click the Day button on the Standard toolbar.

BE SURE TO display the Calendar before beginning this exercise.

1. In the **Navigation Pane**, in the **Date Navigator**, click tomorrow's date.

   > **Tip** The Date Navigator displays six weeks at a time, including the selected month. The days of the selected month are black; days of the previous and next months are gray, but you can still select them in the Date Navigator.

   Outlook displays tomorrow's schedule.

2. In the **Calendar** pane, point to the **1:00 P.M.** time slot (or, if you already have an appointment scheduled at 1:00 P.M., to another time when you have 30 minutes available).

   Click To Add Appointment appears in the time slot.

3. Click once to activate the time slot.

   In this mode, you can enter basic appointment details directly in the Calendar pane.

4. Type **SBS Lunch with Jane**, and then press Enter.

   > **Important** The subject of each appointment, meeting, or event we have you create while working through these exercises begins with *SBS* so that you can easily differentiate the practice files from other items on your calendar.

   Outlook creates a half-hour appointment beginning at 1:00 P.M.

5. Drag the appointment from the **1:00 P.M.** time slot to the **12:00 P.M.** time slot (or, if you already have an appointment scheduled at noon, to another time when you have an hour available).

   Outlook changes the appointment start time.

6. Point to the bottom border of the appointment, and when the pointer becomes a double-headed arrow, drag down so that the appointment ends at **1:00 P.M.**

   You can add more details to the appointment and vary from the default settings from within the appointment window.

7. Double-click the **SBS Lunch with Jane** appointment.

   The appointment window opens. The subject, start time, and end time are set according to the information you entered in the Calendar pane.

8. In the **Location** box, type Fourth Coffee.

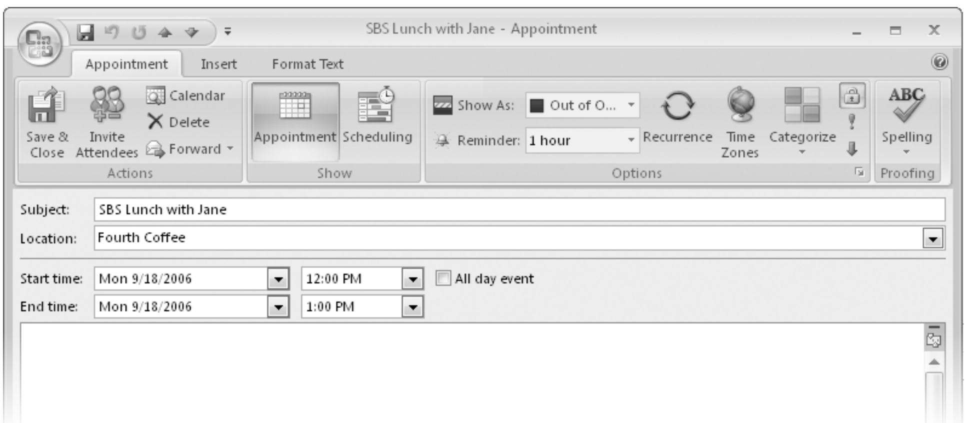
9. On the **Appointment** tab, in the **Options** group, click the **Show As** arrow, and then in the list, click **Out of Office**.

10. In the **Options** group, click the **Reminder** arrow, and then in the list, click **1 hour**.


Private

11. In the **Options** group, click the **Private** button.

    Marking an appointment, event, or meeting as Private hides the details from anyone you share your calendar with.



12. In the **Actions** group, click the **Save & Close** button.

    Outlook adds a purple stripe at the left side of the appointment to indicate you will be out of the office, and displays the location. The lock icon in the lower-right corner indicates that the appointment has been marked as private.

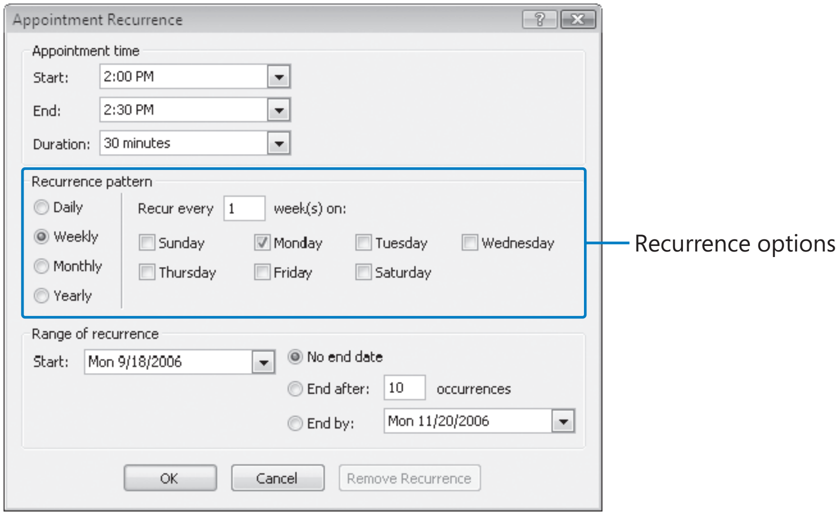
13. Double-click the **2:00 P.M.** time slot.

    Outlook opens an appointment window with the appointment start time set to 2:00 P.M. and the end time set 30 minutes later.

14. In the **Subject** box, type SBS Staff Meeting. Then in the **Location** box, type Conference Room.

15. On the **Appointment** tab, in the **Options** group, click the **Recurrence** button.

    The Appointment Recurrence dialog box opens.

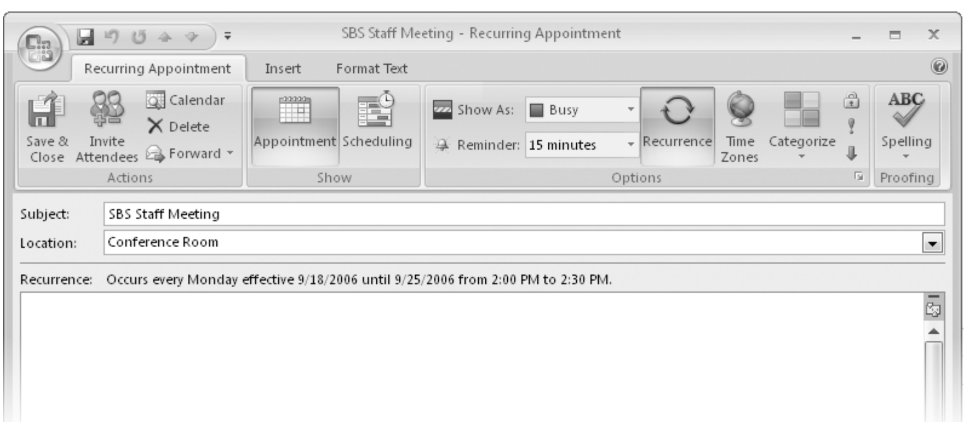


The default appointment recurrence is weekly on the currently selected day of the week. You can set the appointment to recur until further notice, or to end after a certain number of occurrences or by a certain date.

16. In the **Range of recurrence** area, click **End after**, and then in the box, replace *10* with 2.

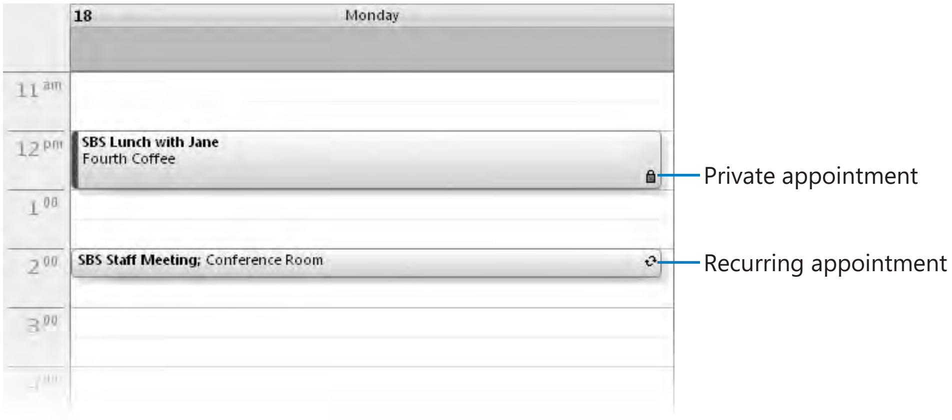
17. To create a 30-minute appointment beginning at 2:00 P.M. on the selected day of the week, this week and next week only, click **OK**.

The appointment window title bar changes to reflect that this is now a recurring appointment, the Appointment tab changes to a Recurring Appointment tab, and the frequency (labeled *Recurrence*) appears in the header.



18. On the **Recurring Appointment** tab, in the **Actions** group, click the **Save & Close** button.

The appointment appears on your calendar. The circling arrow icon at the right end of the time slot indicates the recurrence.



19. In the **Date Navigator**, click the day of the appointment in each of the next two weeks, to verify that the appointment appears on your calendar the next week, but not the following week.

See Also For information about creating a OneNote page linked to an appointment, see the sidebar "Creating a OneNote Page Linked to an Appointment, an Event, or a Meeting" in Chapter 20, "Managing Your Calendar."

Scheduling and Changing Events

Events are day-long blocks of time that you schedule on your Outlook calendar—for example, a birthday, a payroll day, or anything else occurring on a particular day but not at a specific time. In all other respects, events are identical to appointments, in that you can specify a location, indicate recurrence, indicate your availability, invite attendees, and attach additional information to the event item.

You can create an event when viewing your calendar in Day view, Week view, or Month view.

In this exercise, you will schedule an event and convert it to a recurring event. There are no practice files for this exercise.

BE SURE TO display the Calendar in Day view before beginning this exercise.

1. In the **Date Navigator**, click tomorrow's date.
2. In the **Calendar** pane, point to the blank space below the day header and above the delineated time slots.

   Click To Add Event appears in the space.
3. Click once to activate the event slot.

   In this mode, you can enter basic event details directly in the Calendar pane.
4. Type SBS Anniversary, and then press Enter.

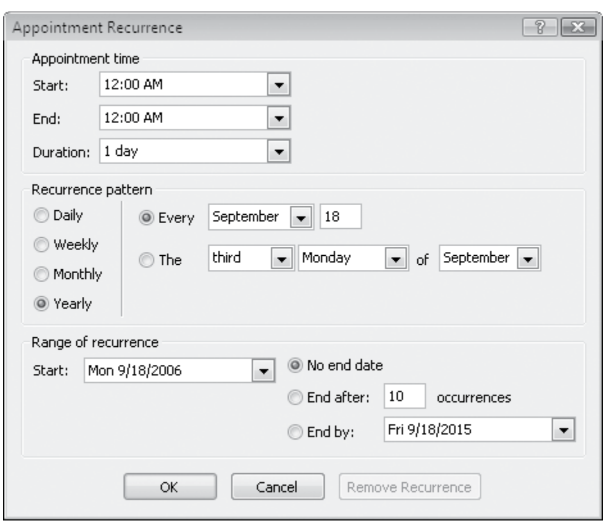
   Outlook creates a one-day event. You can add more details to the event and vary from the default settings from within the event window.
5. Double-click the **SBS Anniversary** event.

   The event window opens. The subject and date are set according to the information you entered in the Calendar pane.

6. On the **Event** tab, in the **Options** group, click the **Recurrence** button.

   The Appointment Recurrence dialog box shown earlier in this chapter opens. The default recurrence for events is the same as for appointments—weekly on the currently selected day of the week.
7. In the **Recurrence pattern** area, click **Yearly**.

   You can schedule an annual event to recur on a specific date or on a selected (first, second, third, fourth, or last) day of the month.

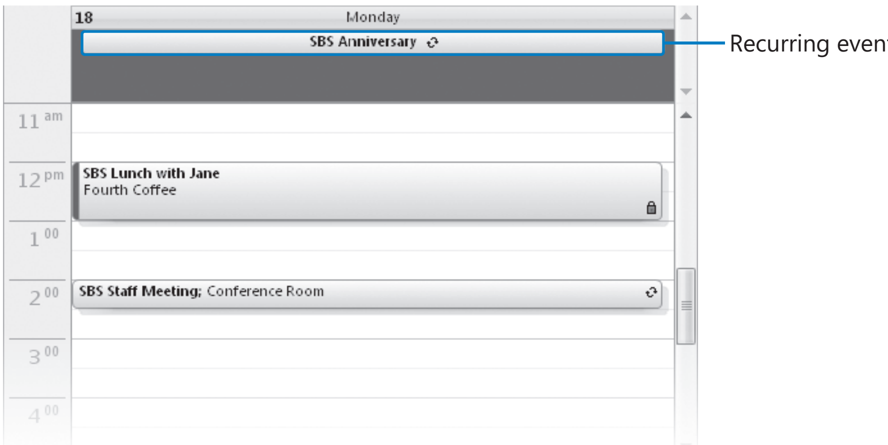


8. To create a recurring annual appointment on the same date each year, click **OK**.

   The event window title bar changes to reflect that this is now a recurring event, the Event tab changes to a Recurring Event tab, and the frequency appears in the header.

9. On the **Recurring Event** tab, in the **Actions** group, click the **Save & Close** button.

   The event appears at the top of the Calendar pane. The circling arrow icon at the right end indicates the recurrence.



Scheduling, Updating, and Canceling Meetings

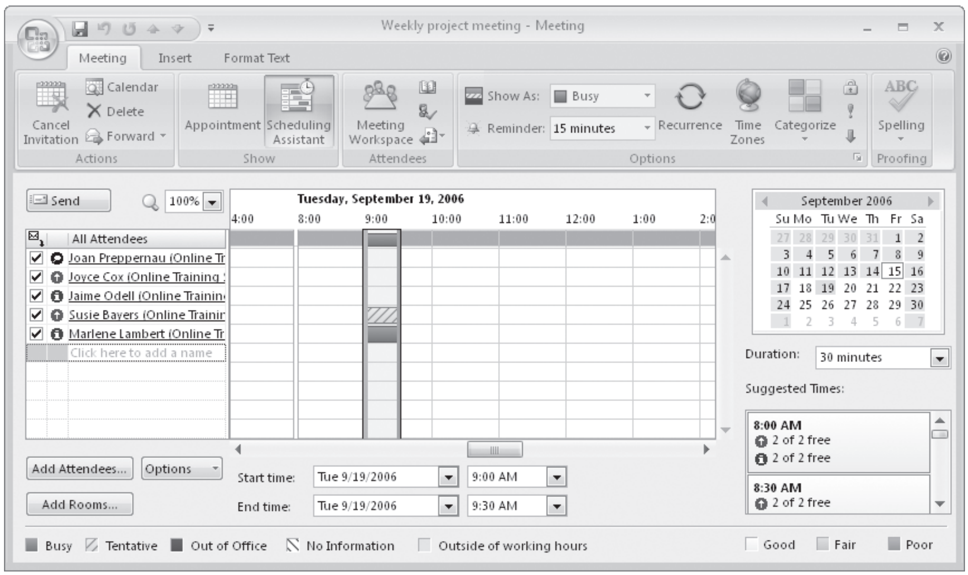
Scheduling meetings through Outlook is significantly simpler than scheduling meetings manually, particularly when you are coordinating the schedules of several people. A primary difficulty when scheduling a meeting is finding a time that works for everyone. Outlook displays the individual and collective schedules of people within your own organization, and of people outside of your organization who have published their availability to the Internet.

You can send a meeting invitation (referred to as a ***meeting request***) to any person who has an e-mail account (even to people who don't use Outlook). You can inform non-critical attendees of the meeting by marking their attendance as Optional. You can invite entire groups of people by using an e-mail alias or distribution list. The meeting request can include text and Web links, as well as file attachments. This is a convenient way of ensuring that meeting attendees have specific information available to them. Outlook automatically tracks responses from attendees and those responsible for scheduling the resources you requested, so you always have an up-to-date report of how many people will be attending your meeting.

Using the Exchange Server 2007 Smart Scheduling Feature

If your organization is running Exchange Server 2007, Outlook simplifies even further the process of selecting a suitable meeting time by presenting you with a list of meeting times of any duration you specify, and indicating for each time the number of required and optional attendees who are available.

The Scheduling Assistant page is similar to the Scheduling page displayed when you are organizing a meeting on an Exchange Server 2003 network.



The calendar on the right side of the window indicates the collective availability of the group by color. Past dates and non-working days are shaded; scheduling suggestions are not provided for those days. The dates are color coded as follows:

- Days when all attendees are available are white (Good)
- Days when most attendees are available are light blue (Fair)
- Days when most attendees are not available are medium blue (Poor)

In the Suggested Times list, Outlook displays attendee availability for appointments of the length specified in the Duration list. The availability of required attendees is shown separately from that of optional attendees and resources.

Selecting a date in the calendar displays the suggested meeting times for that day. Clicking a meeting time in the Suggested Times list updates the meeting request.

If your organization is running Microsoft Exchange Server and the Exchange Server directory includes shared resources such as conference rooms or presentation equipment, you can request these resources by inviting them to the meeting. Resource requests may be automatically approved, or an individual may be assigned the responsibility of approving each resource request.

You might find it necessary to change the date, time, or location of a meeting—for example, because of a schedule conflict. You can change any information in a meeting request at any time, including adding or deleting invited attendees, or canceling the meeting. After you make changes, Outlook sends an updated meeting request to the invited attendees to keep them informed. If the only change you make is to the attendee list, Outlook gives you the option of sending an update only to the affected attendees.

In this exercise, you will create and send a meeting request. There are no practice files for this exercise.

BE SURE TO display the Calendar and before beginning this exercise, inform a co-worker or friend that you are going to practice inviting him or her to a meeting.

1. In the **Date Navigator**, click tomorrow's date. Then in the **Calendar** pane, click the **3:00 P.M.** time slot (or if you have a conflicting appointment, click a time when you have 30 minutes available).

New Appointment

2. On the **Standard** toolbar, click the **New Appointment** arrow, and then in the list, click **Meeting Request**.

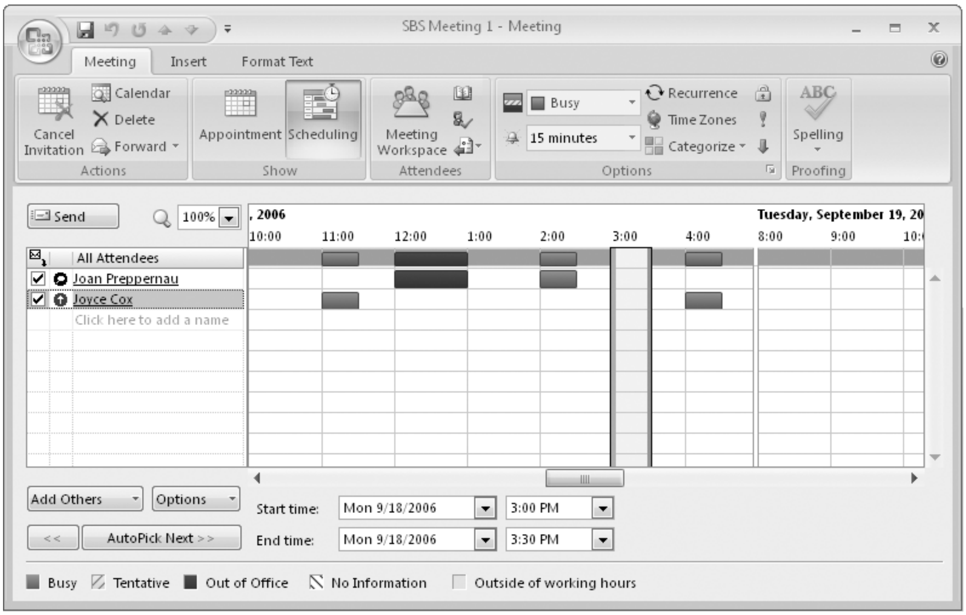
   An untitled meeting window opens.

   > **Troubleshooting** If the active selection in the Calendar pane is an event, Outlook will create an Invited Event request instead; if this happens, clear the All Day Event check box to convert the Invited Event to a Meeting.

3. In the **To** box, type the e-mail address of someone within your organization, or if you aren't working on an Exchange Server network, type any e-mail address, for example, **adam@contoso.com**.
4. In the **Subject** box, type **SBS Meeting 1**.
5. In the **Location** box, type **Test – please accept** to indicate to the person you are inviting that the meeting request is for testing purposes only.

6. On the **Meeting** tab, in the **Show** group, click the **Scheduling** button.

The All Attendees list on the Scheduling page includes you and the e-mail address (or if the person is in your address book, the associated name) you entered in the To box. The black icon next to your name indicates that you are the meeting organizer. The red icon next to the sole attendee's name indicates that he or she is a required attendee. You can click an attendee's icon to switch between Required Attendee and Optional Attendee status, or to indicate a resource rather than a person.



> **Tip** You can enter additional attendees in the To box on the Appointment page or in the All Attendees list on the Scheduling page. If you prefer, you can organize a meeting directly from a Scheduling page-like interface by clicking Plan A Meeting on the Actions menu.

Outlook indicates the suggested meeting time with green (start time) and red (end time) vertical bars. If free/busy information is available for meeting invitees, their time is shown as white (Available), blue (Busy), or purple (Out of Office). Tentative bookings are indicated by light-blue diagonal stripes. If no information is available (either because Outlook can't connect to a person's calendar or because the proposed meeting is further out than the scheduling information stored on the server), Outlook indicates this by gray diagonal stripes. The gray row at the top of the schedule indicates the collective schedule of all the invitees.

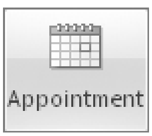
> **Tip** To send an e-mail message to everyone you've invited to a meeting, first open the meeting window, and then on the Meeting tab, in the Attendees group, click the Message To Attendees button.

You can change the time and duration of the meeting to work with the displayed schedules by selecting from the lists at the bottom of the Scheduling page, by dragging the green and red vertical bars in the schedule area, or by clicking the time you want in the schedule area.

7. In the lower-right corner of the **Scheduling** page, click **AutoPick Next**.

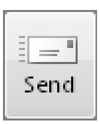
   The green Start Time and red End Time lines move to the next available half-hour time slot.

   You can change the Show As and Reminder settings, create recurrences, assign color categories, and make any other changes you want. The availability specified in the Show As list will apply to all attendees who accept your meeting request.



8. After you select the meeting time you want, click the **Appointment** button in the **Show** group.

   The Appointment page is displayed.



9. Verify the meeting details, and then click the **Send** button in the meeting request header.

   The meeting appears in your calendar on the specified date and in the specified time slot.

Responding to Meeting Requests

When you receive a meeting request from another Outlook user, the meeting appears on your calendar with your time scheduled, but shown as Tentative. Until you respond to the meeting request, the organizer doesn't know whether you plan to attend. You can respond in one of four ways:

- You can accept the request. Outlook deletes the meeting request and shows your time scheduled on your calendar as the meeting organizer indicated in the meeting request.
- You can tentatively accept a request, indicating that you might be able to attend the meeting but are undecided. Outlook deletes the meeting request and shows your time on your calendar as tentatively scheduled.

- You can propose a new meeting time. Outlook sends your request to the meeting organizer for confirmation and shows the original time on your calendar as tentatively scheduled.
- You can decline the request. Outlook deletes the meeting request and removes the meeting from your calendar.

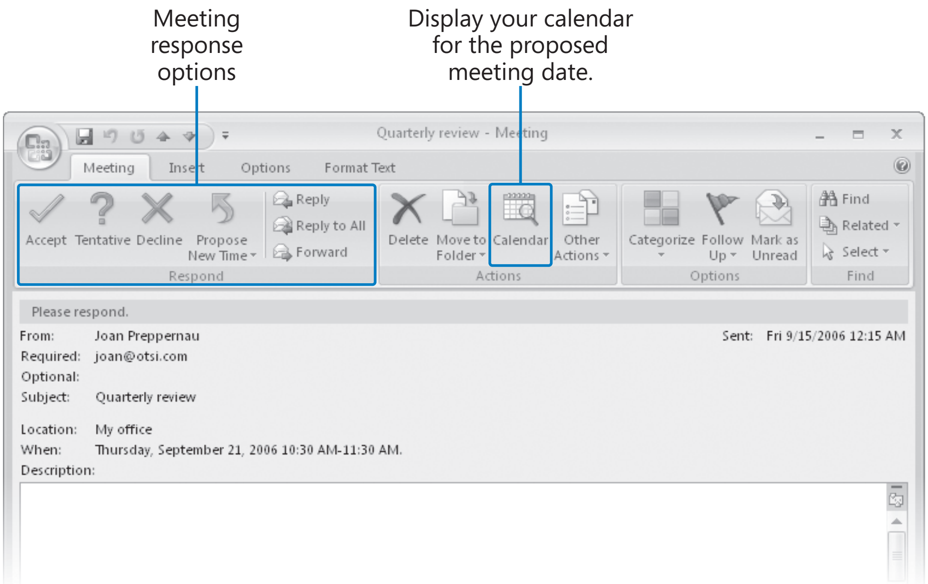
Creating a Meeting Workspace

If your organization has a collaboration site built with Microsoft SharePoint products and technologies, such as a team site, on which you have permission to create document libraries, you can create a ***meeting workspace*** (a shared site for planning a meeting and tracking related tasks and results) at the same time that you schedule the meeting. You can also create a meeting workspace for a meeting that you previously scheduled; after you change the meeting request to include the meeting workspace information, Outlook sends an updated request containing the information to all attendees.

To create a meeting workspace in a new or existing meeting request:

1. In the meeting window, on the **Meeting** tab, in the **Attendees** group, click the **Meeting Workspace** button.
2. In the **Meeting Workspace** pane that opens on the right side of the meeting window, click the **Select a location** arrow, and then in the list, click the SharePoint site where you want to create the meeting workspace. (If this is the first time you've used the Meeting Workspace pane, you might first need to click **Change settings**.) If you haven't previously set up a meeting workspace or document library on the SharePoint site you want to use, click **Other** in the **Select a location** list, enter the SharePoint site address in the **Other Workspace Server** dialog box that opens, and then click **OK**.
3. In the **Select a workspace** area, select the template language and meeting workspace template you want to use, and then click **OK**. Or if you want to link to an existing meeting workspace, click that option, click the **Select the workspace** arrow, and then in the list, click the existing workspace.
4. In the **Meeting Workspace** pane, click **OK**.

Attendees can link to the meeting workspace from the meeting request or from the meeting item on their calendars.



If you don't respond to a meeting request, the meeting remains on your calendar, with your time shown as tentatively scheduled.

If you're unsure whether a meeting time works for you, you can click the Calendar button within the meeting request window to open your Outlook calendar for the suggested meeting day in a separate window, so you can view any conflicting appointments.

When accepting or declining a meeting, you can choose whether to send a response to the meeting organizer. If you don't send a response, your acceptance will not be tallied in the Meeting form, and the organizer and other attendees will not know whether you are planning to attend the meeting. If you do send a response, you can add information to the response before sending it, if you want to convey a message to the meeting organizer.

To manually respond to a meeting request:

1. In the meeting request window, in the **Reading Pane**, or on the shortcut menu that appears when you right-click the meeting request, click **Accept**, **Tentative**, or **Decline**.
2. Choose whether to send a standard response, a personalized response, or no response at all.

To propose a new time for a meeting:

1. In the meeting request window, in the **Reading Pane**, or on the shortcut menu that appears when you right-click the meeting request, click **Propose New Time**.

2. In the schedule area of the **Propose New Time** dialog box, which is similar to the Scheduling page shown earlier, change the meeting start and end times to the times you want to propose, and then click **Propose Time**.
3. In the meeting response window that opens, enter a message to the meeting organizer if you want to, and then click **Send**.

   Outlook sends your response and adds the meeting to your calendar as tentatively scheduled for the original meeting time. After the meeting organizer approves the meeting time change, you and other attendees will receive updated meeting requests.

You can also choose to respond to meeting requests automatically. If you do, Outlook will process meeting requests and cancellations in accordance with your instructions.

To instruct Outlook to automatically respond to meeting requests:

1. On the **Tools** menu, click **Options**.
2. On the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.
3. In the **Calendar Options** dialog box, click **Resource Scheduling**.
4. In the **Resource Scheduling** dialog box, click **Automatically accept meeting requests and process cancellations**.
5. Click **Automatically decline conflicting meeting requests** and/or **Automatically decline recurring meeting requests** if you want Outlook to do this.
6. Click **OK** in each of the open dialog boxes.

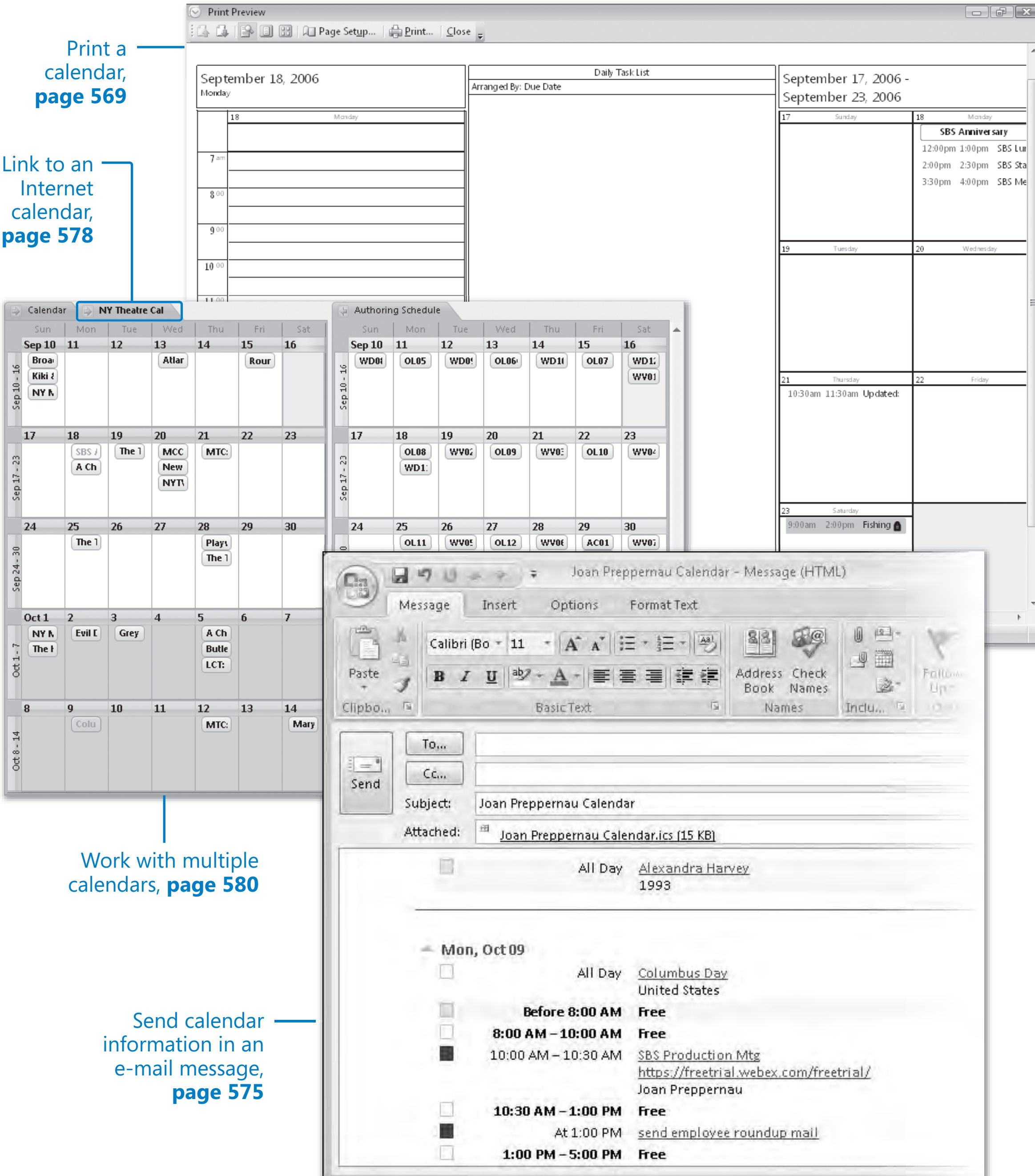
Key Points

- You can create and manage appointments and all-day events in your calendar.
- You can use Outlook to set up meetings, invite participants, and track their responses. Outlook can help you choose a meeting time based on participants' schedules.
- Other people in your organization can see your free, busy, and out-of-office time that you indicate in your calendar. You can personalize the display of your available working hours, and mark appointments as private to hide the details from other people.
- If your organization has a SharePoint collaboration site, you can create a meeting workspace to accompany a meeting request. Meeting workspaces provide a central location for sharing information and files among meeting attendees.
- If you organization is running Exchange Server 2007, you can use the Smart Scheduling feature to quickly identify meeting times of a specific duration during which your planned attendees are available.

Chapter at a Glance

Print a calendar, **page 569**

Link to an Internet calendar, **page 578**



Work with multiple calendars, **page 580**

Send calendar information in an e-mail message, **page 575**

20 Managing Your Calendar

In this chapter, you will learn to:

- ✔ Display different views of a calendar.
- ✔ Define your available time.
- ✔ Configure Outlook for multiple time zones.
- ✔ Print a calendar.
- ✔ Send calendar information in an e-mail message.
- ✔ Link to an Internet calendar.
- ✔ Work with multiple calendars.

Using the Microsoft Office Outlook 2007 Calendar is a big step toward efficient time management. Earlier in this book, you learned how to enter and update various types of appointments in your calendar. To make your calendar work more effectively for you, and to simplify the process of finding the information you need, you can refine the default calendar settings.

In this chapter, you will learn about the different ways you can display calendar information. Then you will print daily and monthly calendars and attach calendar information to an e-mail message. Finally, you will link to a public calendar on the Internet and experiment with the different ways you can display and move between calendars. You also learn how to add region-specific holidays to your calendar, configure Outlook for use in multiple time zones, save information from your Calendar as a Web page, and create a OneNote page linked to a Calendar item, as well as ways in which you can delegate control of your calendar to another person or manage a calendar on behalf of another person.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

> **Important** No practice files are required to complete the exercises in this chapter. For more information about practice files, see "Using the Companion CD" at the beginning of this book.

> **Troubleshooting** Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Displaying Different Views of a Calendar

In the Calendar module, the Navigation Pane includes the ***Date Navigator***, lists of calendars you can connect to, and links to open, search, share, send, and publish calendars. To help you stay on top of your schedule, you can view your calendar in a variety of ways:

- **Day/Week/Month view.** A calendar view displaying one of the following:
  - Day view, displaying one day at a time separated into half-hour increments.
  - Work Week view, displaying your work week, which by default is defined as Monday through Friday from 8:00 A.M. to 5:00 P.M. You can define your work week as whatever days and hours you want.

    See Also **For information about modifying the work week shown in Outlook, see "Defining Your Available Time" later in this chapter.**
  - Week view, displaying one week (Sunday through Saturday) at a time.
  - Month view, displaying five weeks at a time.

  You switch among time periods by clicking the buttons at the top of the Calendar pane. In Month view, you can click the week tab at the left edge of a week to display only that week. In Week view, you can display the work week or the full seven-day week. In either view, you can double-click a day to display only that day.
- **All Appointments view.** A list view displaying all appointments (but not events) grouped by frequency of recurrence (none, Daily, Weekly, Monthly, or Yearly).
- **Active Appointments view.** A list view displaying all appointments starting on or after the current day, grouped by frequency of recurrence.
- **Events view.** A list view displaying only day-long events, grouped by frequency of recurrence.
- **Annual Events view.** A list view displaying only events that recur yearly.
- **Recurring Appointments view.** A list view displaying only recurring appointments and events, grouped by frequency of recurrence.

- **By Category view.** A list view displaying all calendar items grouped by Color Category. Items assigned to multiple categories appear in each of the assigned category groups.
- **Outlook Data Files view.** A list view displaying all calendar items grouped by Outlook Data File and then by frequency of recurrence.

By default, Outlook displays your calendar in Day view. To change the view, click the view you want in the Current View list in the Navigation Pane, or click the view you want on the View menu. To return to the current Day view from any other view, click the Today button on the Standard toolbar.

You can display the previous or next time periods by clicking the Back or Forward button next to the date or date range, or you can display a specific day, week, or month by selecting it in the Date Navigator, as follows:

- To display a month, click the current month name and then in the list, click the month you want to display. To scroll beyond the seven-month range displayed by default, point to the top or bottom of the month list.
- To display a week, click the margin to the left of that week. Or, if you display week numbers in the Date Navigator and Calendar, click the week number to display that week.

> **Tip** Week numbers are used in some countries to reference events, vacations, and the like. Week 1 is the calendar week (Sunday through Saturday) in which January 1st falls, Week 2 is the following week, and so on through to the end of the year. Because of the way the weeks are numbered, a year can comprise Weeks 1 through 53. To display week numbers, click Tools on the Options menu, click the Calendar Options button, and then click Show Week Numbers In The Month View And Date Navigator. Then click OK in the open dialog boxes.

- To display a day, click that day.

> **Tip** If you've made changes to any view (such as the order in which information appears) and want to return to the default settings, point to Current View on the View menu, click Customize Current View, and then in the Customize View dialog box, click Reset Current View. If the Reset Current View button is unavailable, the view already displays the default settings.

In calendar views that include the Date Navigator, increasing the width of the Navigation Pane also increases the number of months shown in the Date Navigator. You can allocate up to 50 percent of the program window to the Navigation Pane.

You can use the Outlook 2007 Instant Search feature to quickly locate appointments, events, meetings, or holidays by searching on any text within the calendar item.

See Also For more information about Instant Search, see "Quickly Locating Messages" in Chapter 18, "Managing Your Inbox."

In this exercise, you will display different periods of time in the Date Navigator and in your calendar, and display different views of your schedule.

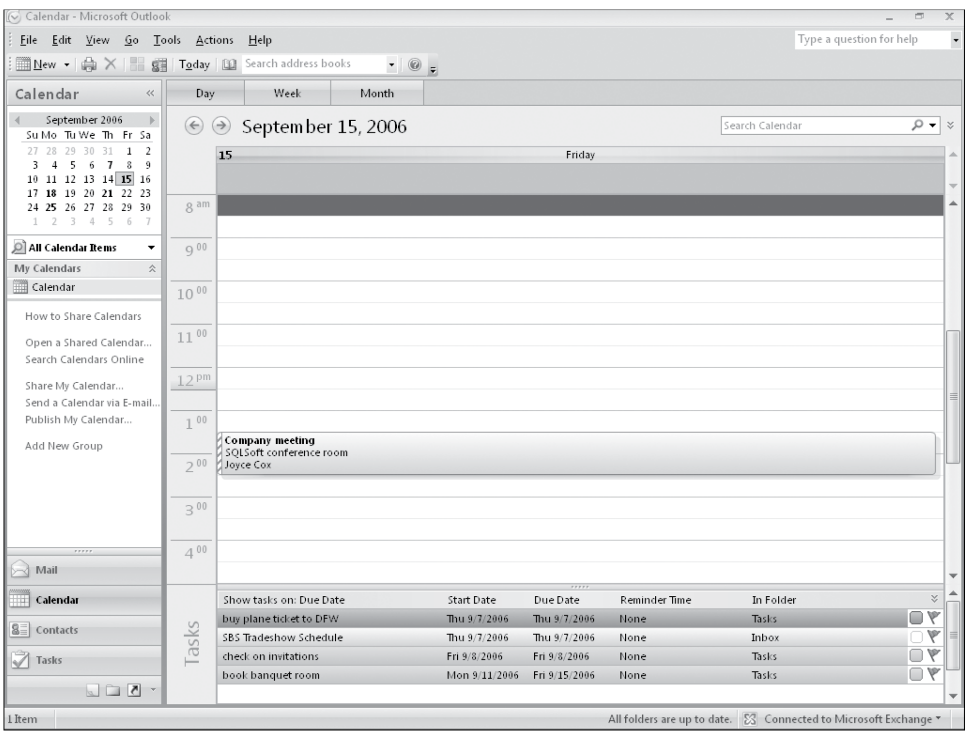
USE the calendar items you created in Chapter 19, "Managing Appointments, Events, and Meetings." If you did not complete the exercises in that chapter, you can complete them now, or use any appointments, meetings, or events in your own calendar.

BE SURE TO start Outlook before beginning this exercise.

Calendar

1. In the **Navigation Pane**, click the **Calendar** button to display the Calendar module.

   By default, Outlook displays your calendar for the current day, which is indicated in the Date Navigator by a red outline. Tasks due today are listed in the Tasks area at the bottom of the Calendar pane.



> **Tip** To reset your calendar to the default display settings, point to Current View on the View menu, click Customize Current View, and then in the Customize View dialog box, click Reset Current View. Then click OK in the message box requesting confirmation, and in the open dialog box.

2. In the **Date Navigator**, click a bold date to display your calendar for a day on which you have scheduled appointments or meetings.

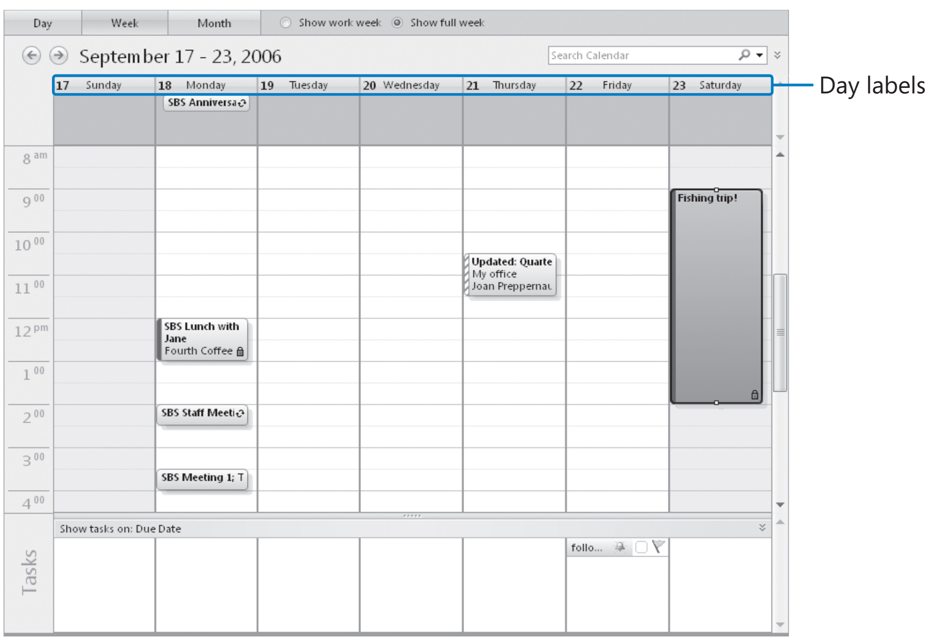
   Dates with scheduled events (but no appointments or meetings) do not appear bold.

3. At the top of the **Calendar** pane, click **Week**.

   Outlook displays your calendar for the work week of the selected date, and highlights the corresponding days in the Date Navigator. The Tasks area displays tasks due each day.

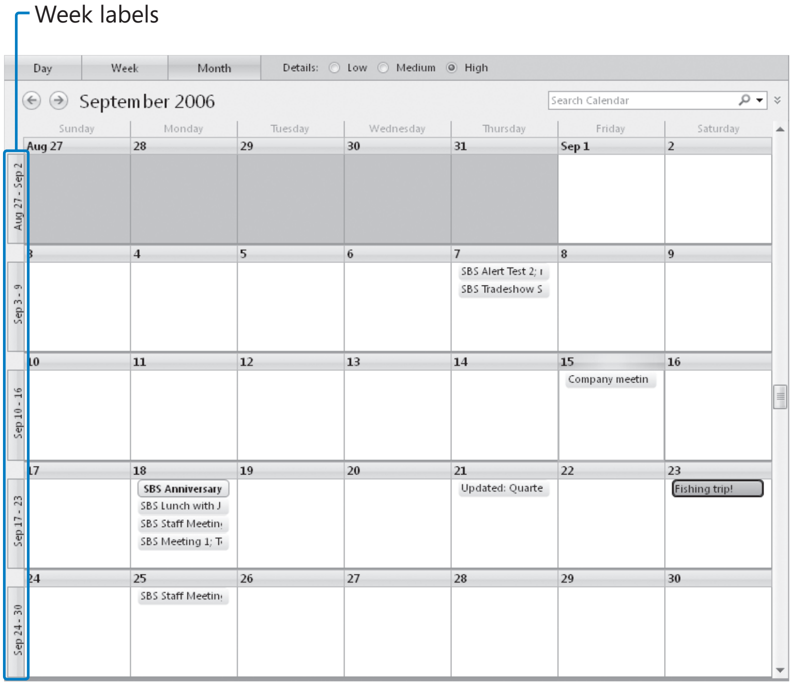
4. At the top of the **Calendar** pane, click **Show full week**.

   Outlook displays the full seven-day week. Time that falls outside of your defined work week appears shaded.



5. At the top of the **Calendar** pane, click **Month**.

   Outlook displays your calendar for the month. Alternating months are shaded to provide an obvious visual indicator of the change. The Tasks area is not available in Month view.



You can display a different month by scrolling the Calendar pane or by clicking the month you want to view, in the Date Navigator.

6. At the top of the **Calendar** pane, to the right of **Details**, click **Medium**.

   The calendar changes to display only events as readable items; appointments and meetings appear as horizontal lines, with the width of the line indicating the amount of time scheduled for that item. The lines representing items assigned to color categories appear in the assigned color.

7. Click **Low** to hide appointments and meetings entirely.

8. Click one of the week labels that appears along the left edge of the Calendar pane.

   Outlook displays the selected week in the most recent week view (Work Week or Full Week) you selected. No detail level is available in Day or Week view; Outlook shows all the calendar items.

Forward

9. To the left of the date range in the calendar header, click the **Forward** button.

   The calendar moves forward one week.

10. Click one of the day labels that appears in the calendar header.

    Outlook displays the selected day in Day View.

11. On the **Standard** toolbar, click **Today** to return to the default view.

Adding and Removing Local Holidays

You can add the national holidays of any country to your Outlook calendar, as follows:

1. On the **Tools** menu, click **Options**. Then on the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.
2. In the **Calendar Options** dialog box, click **Add Holidays**.
3. In the **Add Holidays to Calendar** dialog box, select the check boxes of the countries whose holidays you want to add to your calendar, and then click **OK**.
4. After Outlook adds the selected country's holidays to your calendar, click **OK** in each of the open dialog boxes.

Outlook 2007 assigns a color category named *Holiday* to all holidays in your calendar. If the only holidays in your calendar were added in Outlook 2007, you can view a list of holidays by displaying the calendar in By Category view and then scrolling to the Holiday category. You can then remove all holidays from your calendar by selecting the Categories: Holiday group header and pressing the Delete key.

To remove holidays created in a previous version of Outlook, or if you want to remove only the holidays of a specific country, follow these steps:

1. Display the Calendar in **All Appointments** view.
2. On the **View** menu, point to **Current View**, and click **Customize Current View**.
3. In the **Customize View** dialog box, click **Group By**.
4. In the **Group By** dialog box, clear the **Automatically group according to arrangement** check box if it is selected. Then click the **Group items by** arrow, and in the list, click **Location**.
5. Ensure that all the **Then by** lists display **(none)**, and then click **OK** in each of the open dialog boxes.
6. In the **Calendar** pane, collapse the displayed groups or scroll the pane until the **Location** group of the holidays you want to remove (for example, Location: Sweden) is visible.
7. To remove all the holidays of the displayed country, click the **Location** group header, and then press the Del key. If Outlook displays a message box warning you that this action will apply to all items in the selected group, click **OK**.
8. To remove selected holidays, click the holiday(s) you want to delete (hold the Ctrl key to select multiple holidays), and then press Del.

Defining Your Available Time

You can tell Outlook what your work schedule is so that other people can make appointments with you only during the times that you plan to be available. This defined time is called your ***work week***.

By default, Outlook defines the work week as Monday through Friday from 8:00 A.M. to 5:00 P.M. You can change this to suit your needs—for instance, if you work a late shift or on weekends. Your work week is colored differently in your calendar and by default is the only time displayed to other people on your network who look at your calendar.

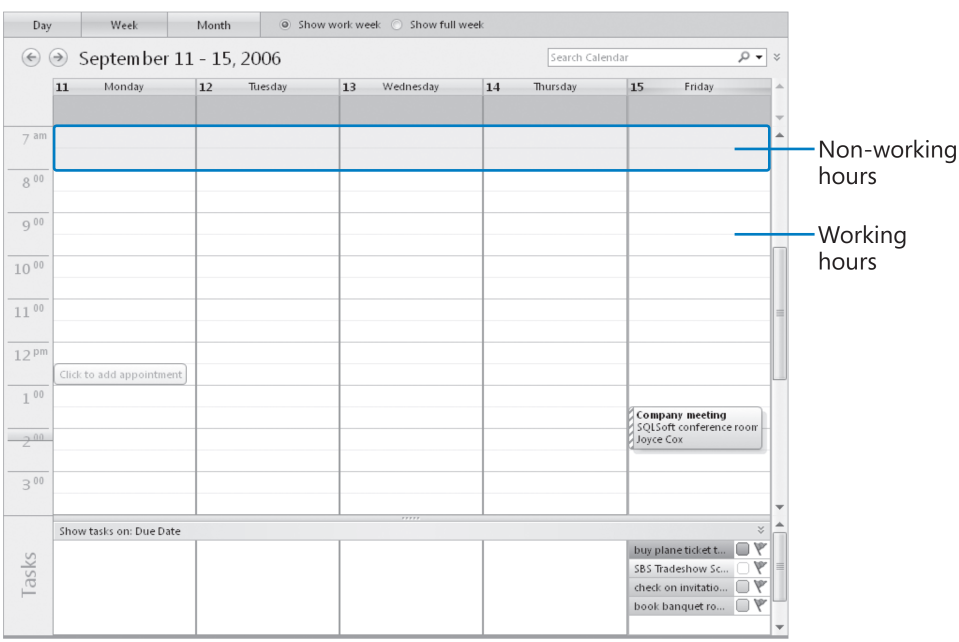
In this exercise, you will view and change your work week. There are no practice files for this exercise.

BE SURE TO display your calendar in Week view before beginning this exercise.

1. At the top of the **Calendar** pane, click **Show work week**.

> **Troubleshooting** If your work week does not match the default days and times described here, work through this exercise using your own settings.

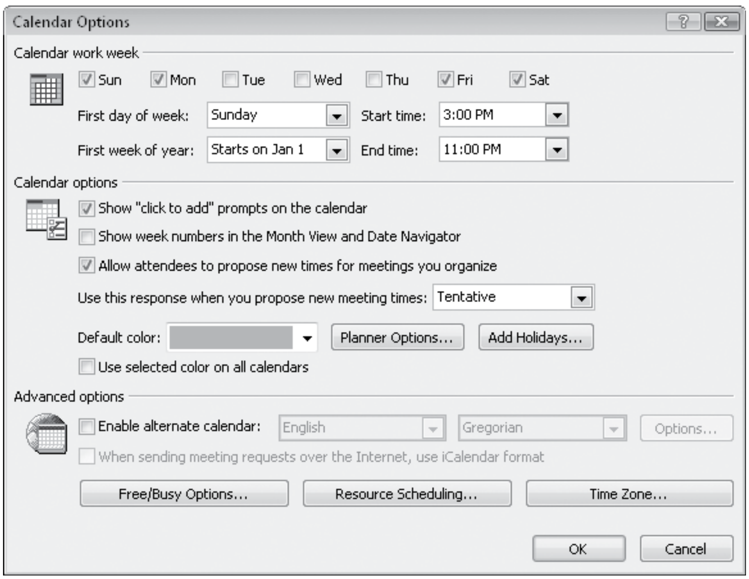
2. Scroll the calendar page so that you can see the beginning or end of the work day.



3. On the **Tools** menu, click **Options**.
4. On the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.

   The Calendar Options dialog box opens.
5. In the **Calendar work week** area, select the **Sun** and **Sat** check boxes, and clear the **Tue**, **Wed**, and **Thu** check boxes.

   The work week is now set to Friday through Monday.
6. Click the **Start time** arrow, and in the list, click **3:00 PM**. Then click the **End time** arrow, and in the list, click **11:00 PM**.



Troubleshooting Outlook doesn't allow you to define a workday that crosses midnight, or to define different start and end times for different days.

7. Click **OK** in each of the open dialog boxes.

   Your calendar displays your new work week settings.

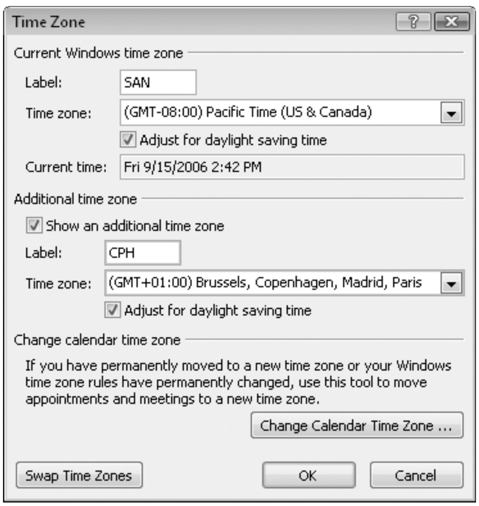
BE SURE TO set up your work week the way you want it before continuing.

Configuring Outlook for Multiple Time Zones

If you frequently travel to locations outside of your usual time zone, you will find it helpful to change the time zone on your computer. You can do this from Windows or from Outlook. When you change the time zone, information such as the receipt time of e-mail messages and appointment times changes to match the new time zone, and if you display the clock in the Windows taskbar notification area, the time shown there also changes.

To change the time zone:

1. On the **Tools** menu, click **Options**. Then on the **Preferences** tab of the **Options** dialog box, click **Calendar Options**.
2. In the **Advanced Options** area of the **Calendar Options** dialog box, click **Time Zone**.
3. In the **Time Zone** dialog box, click the **Time zone** arrow, and in the list, click the time zone you want. Then click **OK** in each of the open dialog boxes.



When preparing to travel, or if you schedule meetings involving participants in different time zones, you might want to configure Outlook to display two time zones in your calendar. Outlook then displays the time zones in Day view in two columns to the left of the Calendar pane.

To simultaneously display two time zones in your calendar:

1. On the **Tools** menu, click **Options**.

2. In the **Options** dialog box, on the **Preferences** tab, click **Calendar Options**.
3. In the **Calendar Options** dialog box, click **Time Zone**.
4. In the **Time Zone** dialog box, select the **Show an additional time zone** check box. Then in the second **Time zone** list, click the time zone you want to display.
5. Type a label for each time zone (such as *San Diego* and *Copenhagen*) in the corresponding **Label** box.
6. Click **OK** in each of the open dialog boxes.

If you set up two time zones in your Outlook calendar, you can quickly switch between them by clicking the Swap Time Zones button in the Time Zone dialog box.

Printing a Calendar

From time to time, you might find it convenient to print a day, week, month, or other period of your calendar; for instance, if you're traveling without a laptop or want to have your weekly schedule quickly available in your briefcase. You can easily print any time period of your calendar. The amount of detail that appears depends on the period you print.

Outlook offers several built-in print styles, and you can create others if you want. The available print styles vary based on what view you're in when you choose the Print command. The default print styles include:

- **Daily Style.** Prints the selected date range with one day per page. Printed elements include the date, day, TaskPad, reference month calendar, and an area for notes.
- **Weekly Style.** Prints the selected date range with one calendar week per page, including reference calendars for the selected and following months.
- **Monthly Style.** Prints a page for each month in the selected date range. Each page includes the six-week range surrounding the month, along with reference calendars for the selected and following months.
- **Tri-fold Style.** Prints a page for each day in the selected date range. Each page includes the daily schedule, weekly schedule, and TaskPad.
- **Calendar Details Style.** Lists your appointments for the selected date range, as well as the accompanying appointment details.

You can select the date or range of dates to be printed and modify the page setup options to fit your needs.

In this exercise, you will learn two ways of selecting print styles as you preview and optionally print your calendar in the Daily and Tri-fold styles. There are no practice files for this exercise.

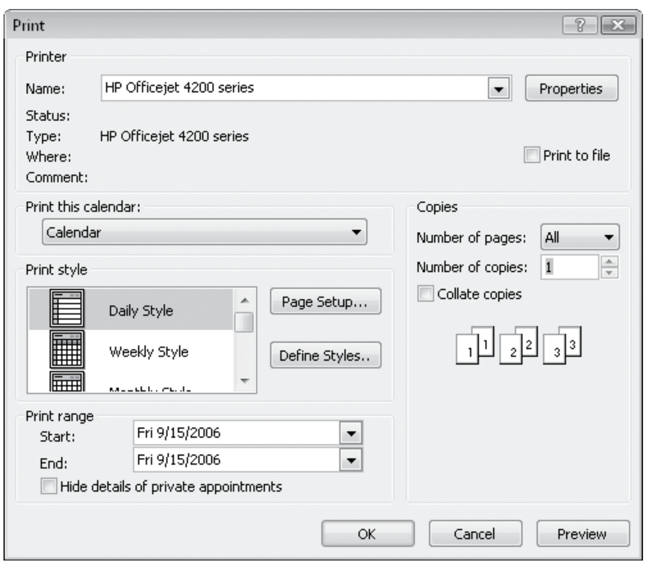
Important To complete this exercise, you must have a printer installed. If you don't have a printer installed, you can preview the various print options, but not print. To install a printer, click the Start button and then click Control Panel. In Control Panel, under Hardware And Sound, click Printers, and then click Add A Printer. If you are working on a network, your administrator can provide the information you need to install a printer.

BE SURE TO display your calendar in Day view before beginning this exercise. For best results, display a day on which one or more appointments, meetings, or events appear on the calendar.

Print

1. On the **Standard** toolbar, click the **Print** button.

   The Print dialog box opens, with the Daily Style format and today's date selected.

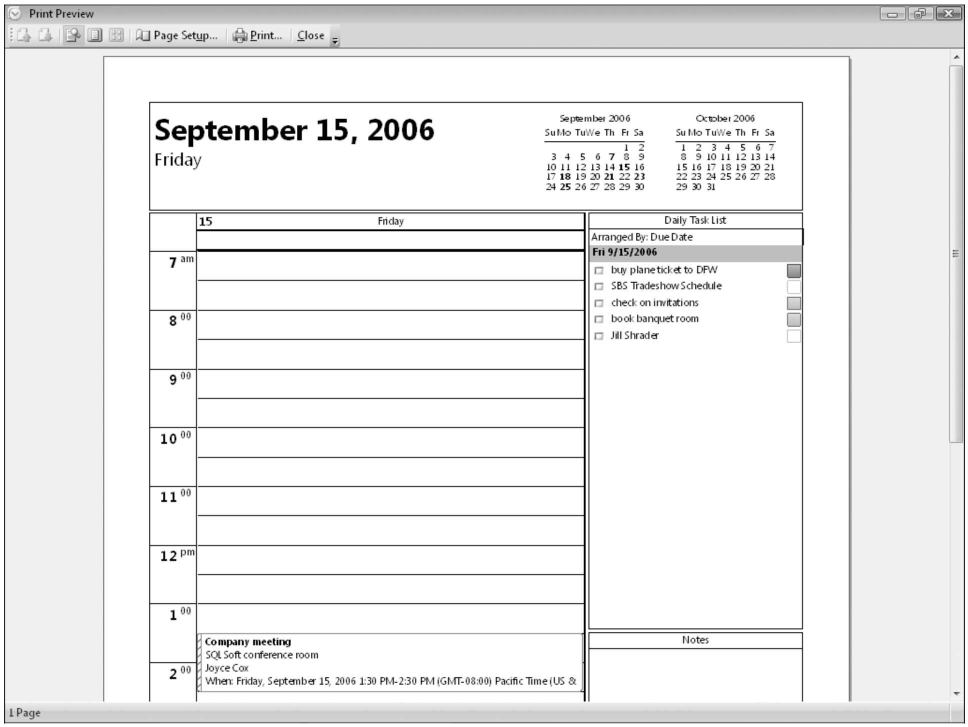


2. In the **Print** dialog box, click **Preview**.

   Outlook displays a Print Preview window depicting how your calendar will appear when printed.

Actual Size

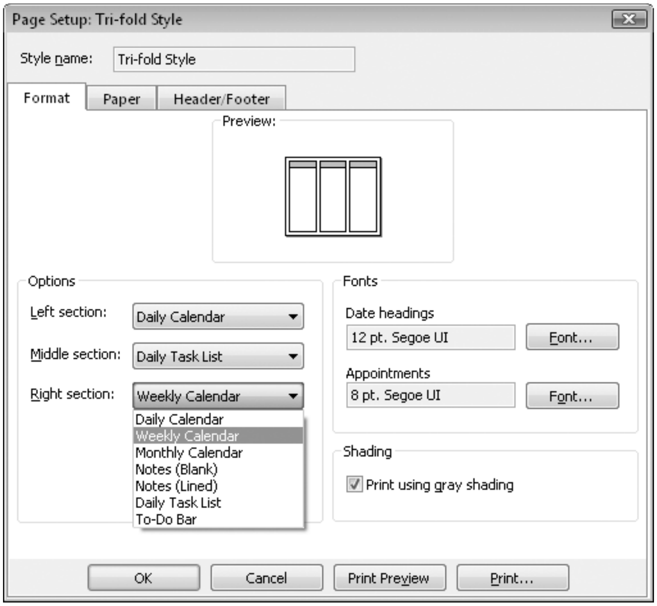
3. On the **Print Preview** toolbar, click the **Actual Size** button to magnify the calendar page so it is legible.



4. On the **Print Preview** toolbar, click **Print**.
5. In the **Print** dialog box, ensure that the printer you want to use is selected in the **Printer** area, and then click **OK**.

   Outlook prints today's schedule in the Daily Style format, which approximates the calendar Day view.
6. On the **File** menu, point to **Page Setup**, and then click **Tri-fold Style**.

The Page Setup dialog box opens, displaying a preview of the Tri-fold print style. In the Options area, you can select the calendar elements you want to print in each of the three panes.



7. In the **Page Setup** dialog box, click **Print**.

   Note that Outlook doesn't retain your settings from one print session to the next.

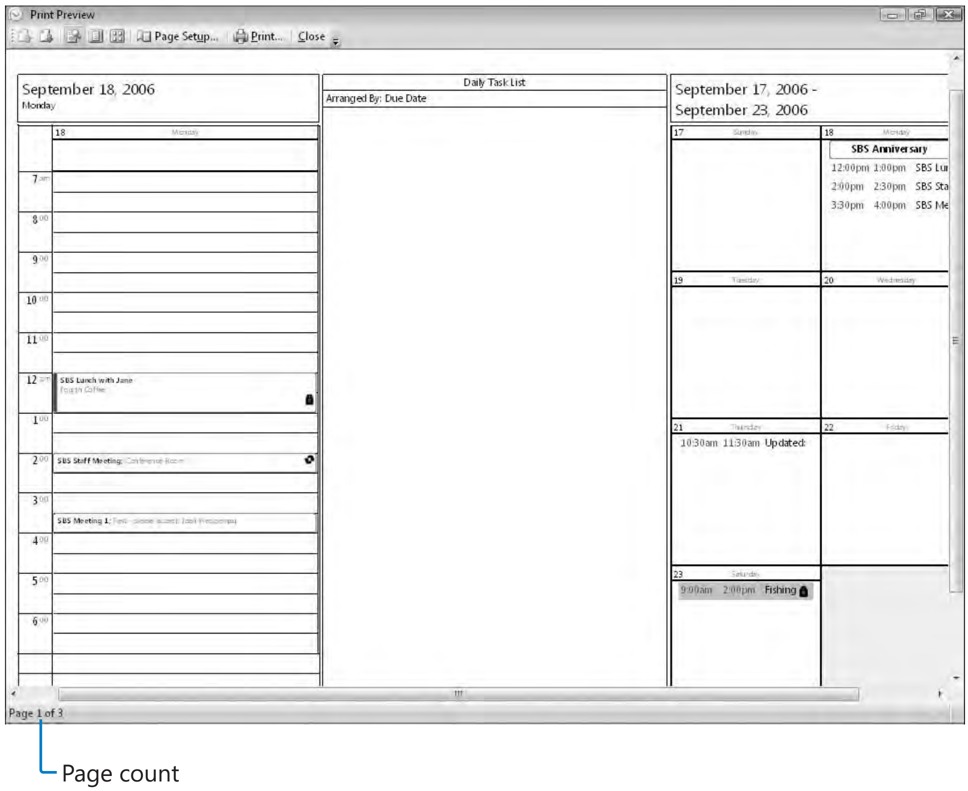
8. In the **Print range** area of the **Print** dialog box, click the **End** arrow, and then in the list, click the date two days from today. Then click **Preview**.

   The Print Preview window displays the tri-fold calendar as it will appear when printed. The insertion point changes to a magnifying glass.

9. Click once near the center of the previewed page to magnify the calendar page.

   In the lower-left corner of the Print Preview window, the status bar indicates that you are viewing the first of three pages, to match the date range you selected.

With the default options, each page displays the daily calendar on the left, your task list for that day in the center, and the weekly calendar on the right. You can preview the second and third pages by scrolling the document.



10. On the **Print Preview** toolbar, click **Print**, and then in the **Print** dialog box, click **OK**.

Outlook prints three pages (one page for each day of the selected date range), and then closes the Print Preview window.

11. Experiment with different print styles and date ranges, previewing the results of each.

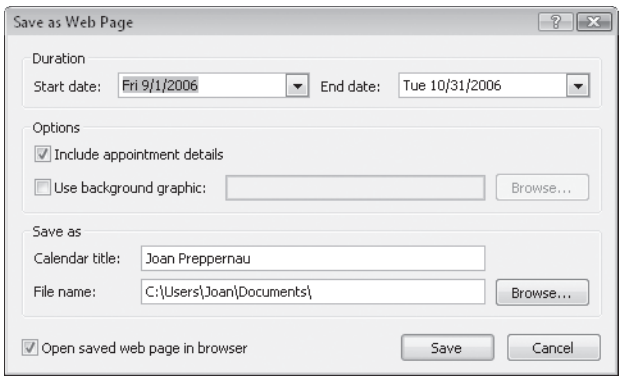
Saving Calendar Information as a Web Page

You can share your schedule with co-workers by publishing it as a Web page on an intranet site, or with a larger group of people by publishing it as a Web page on an Internet site. Outlook provides a simple method of saving selected calendar information as a static HTML page.

To save calendar information as a Web page:

1. Display your calendar. Then on the **File** menu, click **Save as Web Page**.

   The Save As Web Page dialog box opens.

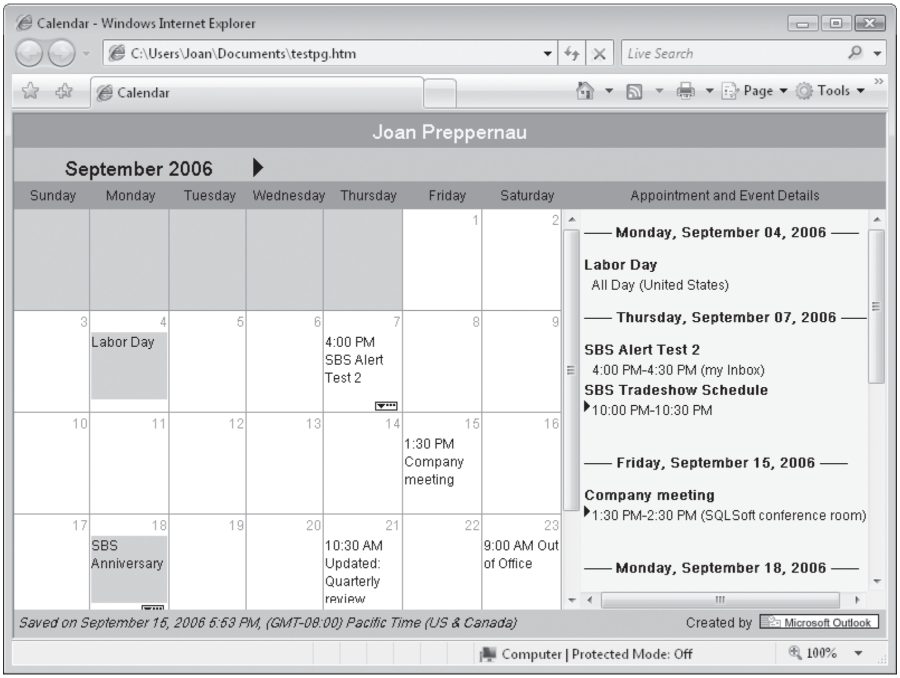
2. Enter the start and end dates for which you want to publish your calendar information.
3. In the **Options** area, select whether to include appointment details or a background graphic.
4. In the **Save as** area, append a file name (the extension is unnecessary) at the end of the path shown in the **File name** box. You can change the title that will be displayed on the Web page, and change the location where Outlook saves it.

   By default, Outlook saves calendar Web pages in your *Documents* folder.
5. With the **Open saved web page in browser** check box selected, click **Save**.
6. If Outlook displays a security notice asking you to confirm that you trust the link to the Web page you just created, click **Yes**.
7. If Outlook displays a message box asking you whether to open or save the Web page, click **Open**.

   The page opens in your default Web browser.

(The browser loads the file from your computer, not from the Internet—you haven't yet published the schedule to the Internet.)

8. Review the calendar. If an Information Bar appears at the top of the window, click it, click **Allow Blocked Content**, and then in the **Security Warning** message box, click **Yes** to allow Windows to run an ActiveX control in order to display nicely formatted content.



You can publish the calendar Web page to any intranet or Internet site that you have authoring permissions on.

Sending Calendar Information in an E-Mail Message

You might frequently find it necessary to share information about your schedule with colleagues, friends, or family members. With Outlook 2007, you can easily embed selected calendar information as a static image in an e-mail message that you can send to any person who uses an HTML-capable e-mail program (not only people who use Outlook).

You can choose the period of time for which you want to share information (Today, Tomorrow, Next 7 Days, Next 30 Days, or Whole Calendar, or you can specify a custom date range) and the level of detail you want to share, as follows:

- **Availability only.** Includes only your availability (Free, Busy, Tentative, or Out Of Office) during scheduled time periods.
- **Limited details.** Includes only your availability and the subjects of calendar items.
- **Full details.** Includes your availability and the full details of calendar items.

The details of calendar items marked as Private will not be shown unless you specifically choose to do so.

See Also For information about private appointments, see "Scheduling and Changing Appointments" in Chapter 19, "Managing Appointments, Events, and Meetings."

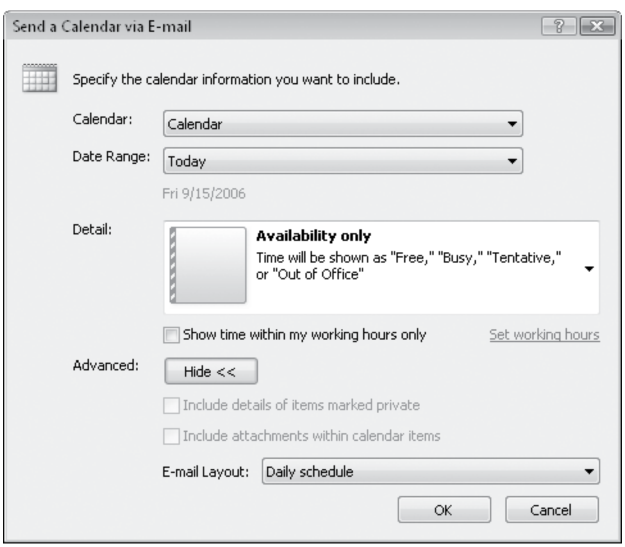
In this exercise, you will embed information about your schedule in an e-mail message. There are no practice files for this exercise.

BE SURE TO display your calendar before beginning this exercise.

1. In the **Navigation Pane**, click **Send a Calendar via E-mail**.

   Outlook opens a new message window and the Send A Calendar Via E-mail dialog box.

2. In the **Advanced** area, click **Show** to display all the options.



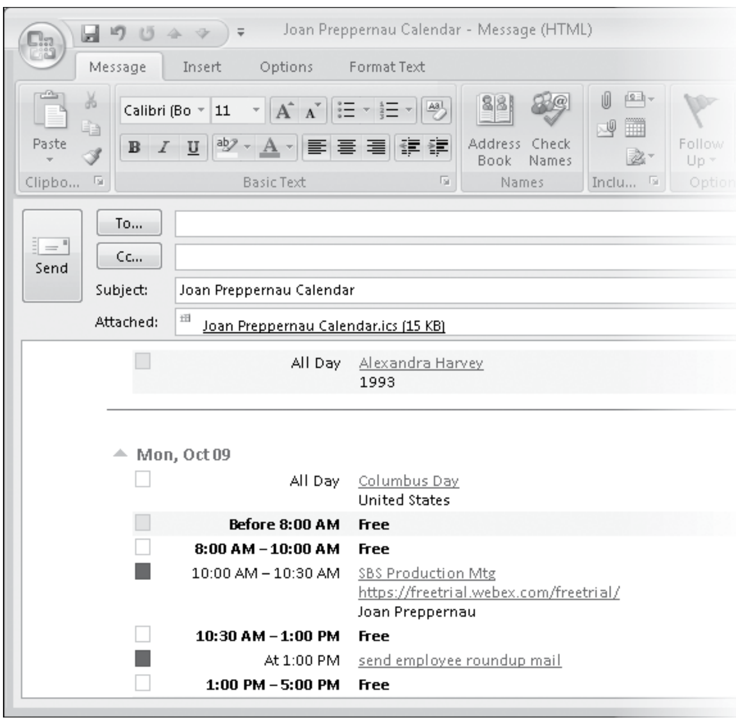
If you have multiple calendar folders in Outlook, you can choose which calendar you want to send information from.

3. Click the **Date Range** arrow, and then in the list, click **Next 7 days**.
4. Click the **Detail** arrow, and then in the list, click **Full details**.

   You can choose whether to include private appointment details and attachments, and whether to present schedule information as a daily schedule or only a list of events.

5. With **Daily schedule** selected in the **E-mail Layout** list, click **OK**.

   Outlook embeds the selected calendar information in the e-mail message window and also attaches the same information as an *.ics* file. You can send the e-mail message to any recipient. A recipient using an e-mail program that supports *.ics* files can add your calendar information to his or her calendar list.



6. Scroll the e-mail to view its contents. Then experiment with other time periods, details, and layout options on your own.

CLOSE or send the e-mail message.

Creating a OneNote Page Linked to an Appointment, an Event, or a Meeting

If your 2007 Office system installation includes Microsoft Office OneNote, you can link calendar entries from Outlook to your OneNote notebook.

To link one or more calendar entries to OneNote:

1. Display the Calendar, and select the item (or items) you want to link.
2. On the **Standard** toolbar, click the **Notes About This Item** button.

   OneNote starts (if it isn't already running) and, in its Unfiled Notes section, creates a page for each of the selected calendar items. Each page contains the appointment, event, or meeting information and a link that opens the original Outlook calendar item from within OneNote.

You can move pages from the Unfiled Notes section to a notebook section by dragging or by right-clicking the page tab, pointing to Move Page To, and then clicking Another Section. In the Move Or Copy Pages dialog box, click the target notebook section, and then click Move.

Linking to an Internet Calendar

A variety of specialized calendars tracking professional sports schedules, holidays, entertainment, scientific data, and so on are available from the Microsoft Office Online Web site. You can link to these Internet calendars from the Calendar module so that you have up-to-date information conveniently available, in the same place as your own scheduling information.

After you link to an Internet calendar, you can display or hide the linked calendar at any time by selecting or clearing its check box in the Other Calendars section of the All Calendar Items list. You can display Internet calendars within the Calendar module as you would any other, viewing them independently or next to another calendar, or displaying a combined view of information from multiple calendars. You can remove the linked calendar from your list of available calendars by right-clicking the calendar's tab and then clicking Delete.

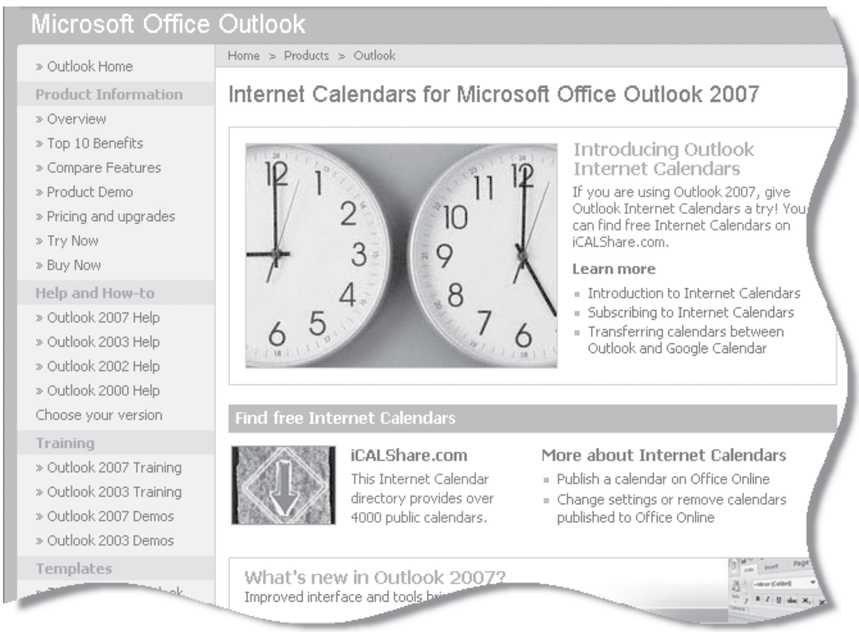
See Also For information about linking to a SharePoint calendar, see "Linking a SharePoint Calendar to Outlook" in Chapter 27, "Enabling Collaboration by Using SharePoint."

In this exercise, you will link to an Internet calendar. There are no practice files for this exercise.

BE SURE TO display your calendar before beginning this exercise.

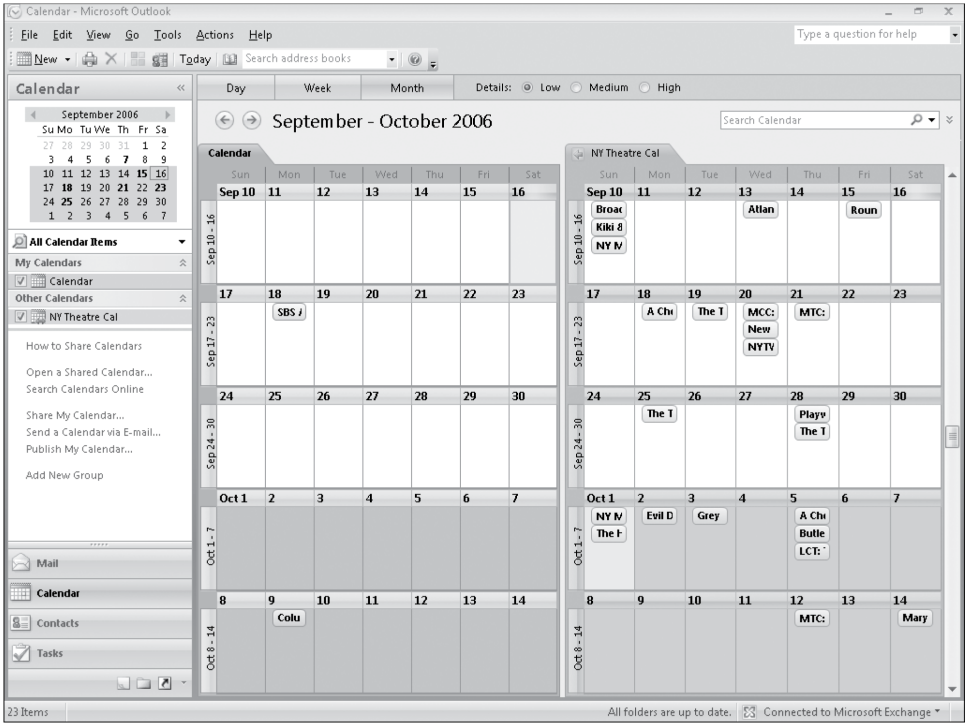
1. At the bottom of the **Navigation Pane**, click **Search Calendars Online**.

   The Internet Calendars page of the Office Online Web site opens in your default Internet browser.



2. In the **Find free Internet Calendars** area, click the Internet Calendar directory.
3. Click any category and any Internet calendar that interests you.
4. If an **Internet Explorer Security** message box appears prompting you to allow Outlook to open Web content, click the **Allow** button.
5. In the **Microsoft Office Outlook** message box asking whether you want to add the calendar to Outlook and subscribe to updates, click **Yes**.

   Outlook adds the selected Internet calendar to your Other Calendars list, and displays it in the Calendar pane, side by side with your own calendar.



The linked calendar also appears in the Other Calendars list in the Navigation Pane. Any calendars you link to that aren't your own—for example, SharePoint calendars, calendars of co-workers, and so on—appear in this list.

BE SURE TO retain the linked Internet calendar for use in the next exercise.

Working with Multiple Calendars

It is often useful to have more than one Outlook calendar. The process of creating a secondary calendar is the same as that of creating an address book or mail folder—you simply create a folder designated to hold calendar items.

You can display calendars individually, or you can display more than one calendar at a time. For instance, you might have separate business and personal calendars and want to view them together.

You can view multiple calendars next to each other, or you can overlay them to display a composite view of the separate calendars. When you view and scroll multiple calendars, they all display the same date or time period.

You can drag items from one calendar to another, and copy items between calendars by dragging with the right mouse button and then clicking Copy on the context menu.

In this exercise, you will view multiple calendars next to each other and then as a composite. There are no practice files for this exercise.

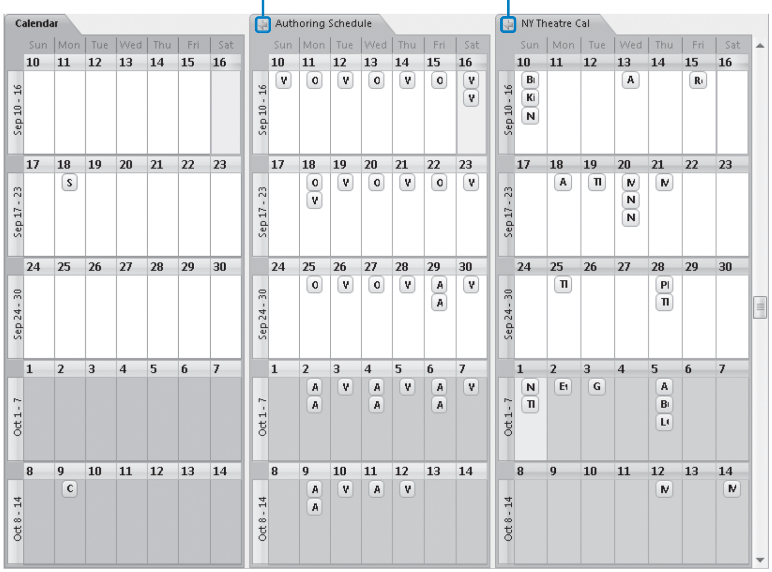
BE SURE TO display your calendar and complete the previous exercise, "Linking to an Internet Calendar," before beginning this exercise.

1. In the **Navigation Pane**, in the **My Calendars** or **Other Calendars** list, select the check box for at least one other calendar.

   Tip If you just completed the previous exercise, a second calendar is already visible.

   By default, Outlook displays the calendars side by side and in different colors.

   View in Overlay Mode buttons



   In Side-By-Side mode, the title bar tab of each calendar other than your own displays a View In Overlay Mode button.

View in Overlay Mode

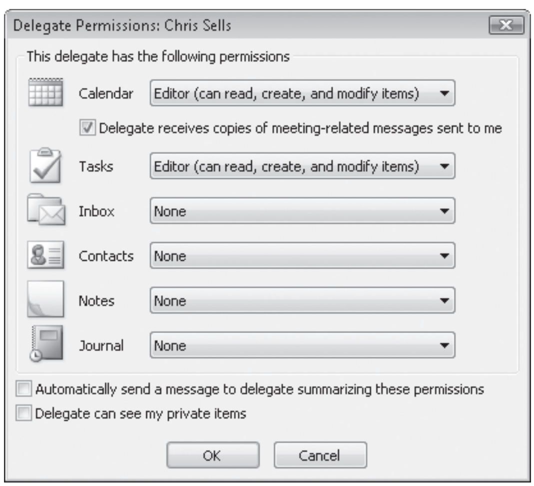
2. On the title bar tab of any secondary calendar, click the **View in Overlay Mode** button.

Delegating Control of Your Calendar

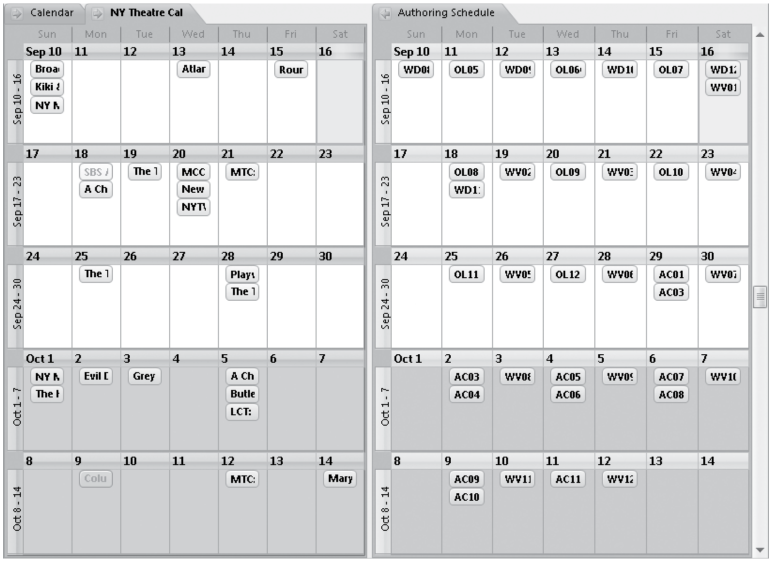
You can delegate control of any Outlook module to a co-worker so that he or she can create and respond to meeting requests on your behalf. Then meeting requests sent to you are delivered to your delegate rather than to you. You receive copies of the meeting requests and copies of your delegate's responses, but you don't have to respond. Your delegate can create meeting requests on your behalf (that is, they appear to come from you)

To delegate control:

1. On the **Tools** menu, click **Options**.
2. On the **Delegates** tab of the **Options** dialog box, click **Add**.
3. In the **Add Users** dialog box, click the person you want to delegate control to, click **Add**, and then click **OK**.



4. In the **Delegate Permissions** dialog box, click the **Calendar** arrow, and then in the list, click the level of permission you want to delegate.
5. Select any other permissions you want to delegate.
6. Select the **Automatically send a message to delegate summarizing these permissions** check box, and then click **OK**.
7. In the **Options** dialog box, select whether you would like to receive copies of meeting requests and responses. Then click **OK**.



3. Click the **Calendar** tab to display your calendar on top of the Internet calendar.

View in Side-By-Side Mode

4. On either of the overlaid calendars, click the **View in Side-By-Side Mode** button to return to the standard display.

BE SURE TO clear the check boxes of any secondary calendars, leaving only your own calendar displayed. If you have finished working with Outlook, exit the program.

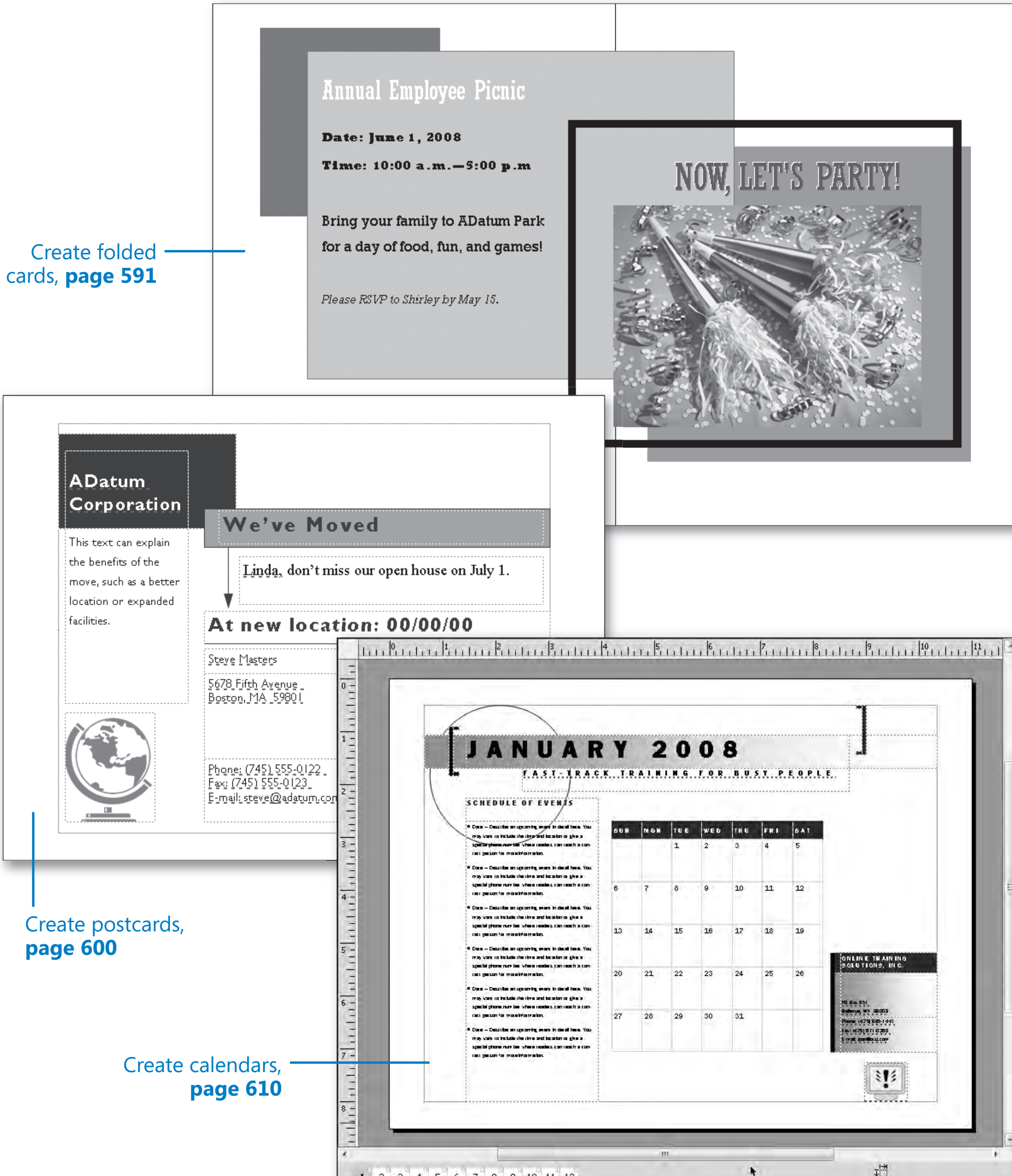
Key Points

- You can display a traditional calendar view of your schedule by the day, work week, full week, or month. You can display multiple list views of calendar items.
- You can display multiple time zones, change your calendar as you travel between time zones, and schedule appointments or meetings that start and end in different time zones.
- You can print selected schedule information in a number of different layout styles.
- You can share schedule information by sending it in an e-mail message or by publishing it to a Web site.
- You can subscribe to many types of calendars available from the Internet. Internet calendar information is automatically updated.
- You can view two or more calendars next to each other or as a composite. Outlook displays each calendar in a different color so you can easily tell them apart.

Part VI

Microsoft Office Publisher 2007

Chapter at a Glance



Create folded cards, **page 591**

Create postcards, **page 600**

Create calendars, **page 610**

21 Creating Colorful Cards and Calendars

In this chapter, you will learn to:

- ✔ Create folded cards.
- ✔ Create postcards.
- ✔ Create calendars.
- ✔ Package publications for printing.

Cards and calendars can be among the easiest publications to produce. Microsoft Office Publisher 2007 provides dozens of attractive templates from which you can create and personalize these items, perhaps to send to friends or clients. However, if you intend to distribute a lot of them, you might need to do some advance planning. Several of the decisions you need to make before creating cards and calendars for large-scale distribution revolve around the cost, in time and money, of printing the final product.

In this chapter, we discuss issues such as layout, color, paper, printing, and mailing, while showing you how to produce a folded card, a postcard, and three types of calendars. You also learn how to save time when creating a multi-page publication by applying formatting to the underlying master page.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Storing Personal and Company Information

Many of the publications you create by using Publisher will include the same personal or company information, such as a name, an address, and a phone number. Instead of having to enter this information for each new publication, you enter it only once, in an ***information set***. Then, whenever a new publication includes an item from the information set, Publisher automatically pulls it from the stored record and plugs it in. Similarly, to update personal or company information throughout the publication, you need only update it once, in the information set.

In this exercise, you will create two information sets and apply them to a publication.

USE the *Logo* publication. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PublisherCards* folder.

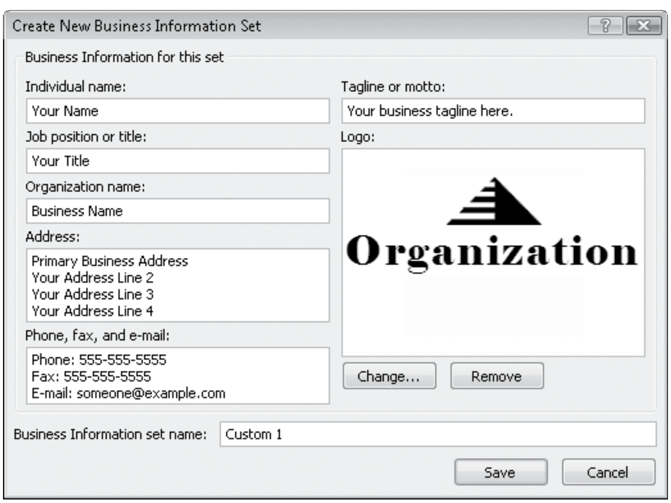
BE SURE TO start Publisher before beginning this exercise. If you don't see the Getting Started window, close all open publications without closing Publisher.

1. In the **Publication Types** list, click **Business Cards**, and then in the center pane, double-click **Marker**.

   Publisher creates a business card containing placeholders for standard information.

2. On the **Edit** menu, click **Business Information**.

   The Create New Business Information Set dialog box opens.



   Publisher fills in any information already available on your computer.

> **Troubleshooting** This dialog box appears only if you have not previously created an information set. If you already have an existing information set, the Business Information dialog box appears. Click New in this dialog box to display the Create New Business Information Set dialog box.

3. Fill in the information in all the boxes except the **Logo** box. If any information does not apply, delete it.

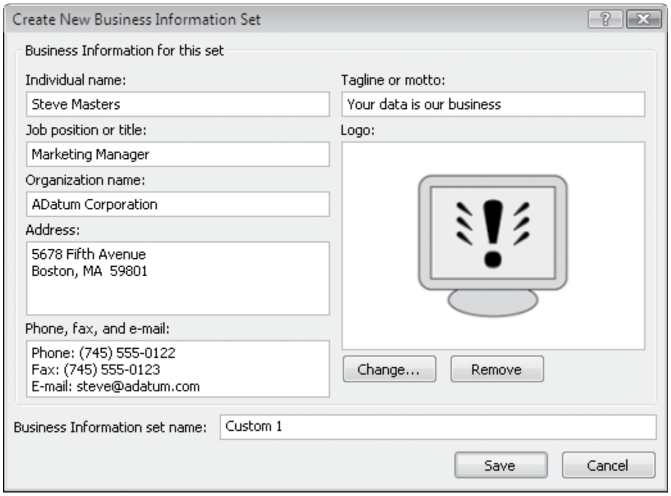
   For example, if you are filling in personal information, delete the entries in the Job Position Or Title and Organization Name boxes and remove the logo.

4. Below the **Logo** box, click **Change**.

   The Insert Picture dialog box opens. You navigate in this dialog box the same way you move around the Save As or Open dialog box.

5. Navigate to the *Documents\Microsoft Press\2007OfficeSBS\PublisherCards* folder, and then double-click the *Logo* file.

   The selected logo appears in the Logo preview area.

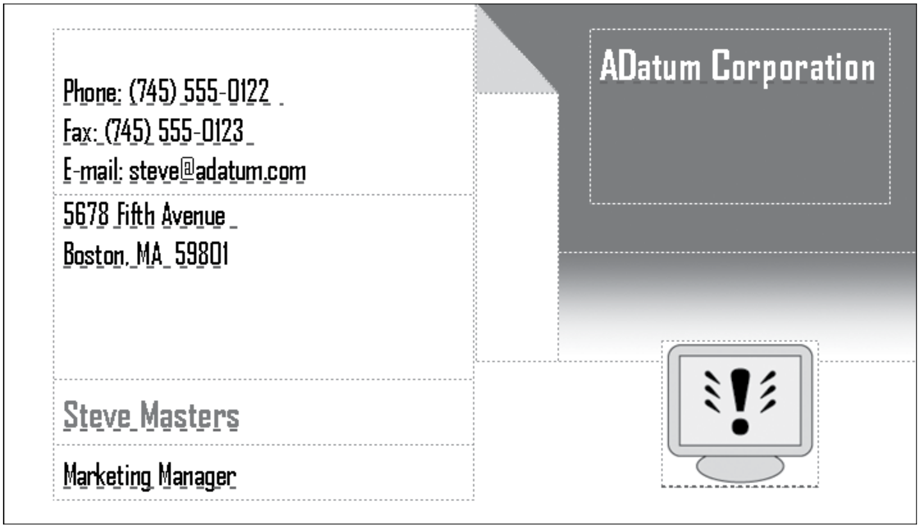


6. In the **Business Information set name** box at the bottom of the dialog box, replace **Custom 1** with a name that represents the information you just entered, and then click **Save**.

   For example, you might enter *Company* or *Personal*.

7. In the **Business Information** dialog box, review the information you just entered, and then click **Update Publication**.

The business card now appears with your information in place.



8. At the right end of the **Format Publication** task pane title bar, click the arrow, and then in the task pane list, click **Business Information**.
9. At the bottom of the task pane, click **Change Business Information** to display the **Business Information** dialog box.
10. Click **New**, and then in the **Create New Business Information Set** dialog box, enter a different set of information, again deleting any elements that are not relevant.

    For example, if you entered your company information before, you might want to enter personal information this time.
11. In the **Business Information set name** box, type an appropriate name, and then click **Save**.
12. Close the dialog box without updating the business card publication, and then close the **Business Information** task pane.
13. On the **Edit** menu, click **Business Information**.
14. In the **Business Information** dialog box, click the arrow to the right of the box containing the name of the information set applied to the publication, click the name of the second set you created, and then click **Update Publication**.

    Publisher updates the business card to reflect the information set you selected.

CLOSE the publication without saving your changes.

Creating Folded Cards

The cards that you buy in a store are usually folded publications with text and graphic elements on all sides. You can print cards that you create in Publisher on both sides of the paper, or you can simulate this effect by printing the content on one side of the paper and then folding it in four. Microsoft Office Publisher 2007 comes with many templates for two types of folded cards: Greeting Cards and Invitation Cards. In addition, five tent-fold templates are available in the Postcards category.

Choosing a Design or Layout

When you choose certain publication types, including Greeting Cards or Invitation Cards, in the Getting Started window, the thumbnails for two kinds of templates appear in the center pane:

- **Design templates.** Templates such as the Thank You type of greeting card or the Party type of invitation card are based on one of the classic Publisher designs, such as Accent Box, Capsules, or Quadrant. When you click one of these templates, the Page Size and Layout settings in the Options area in the right pane are unavailable, so you cannot change the design.
- **Layout templates.** Templates such as the Birth Announcement type of greeting card or the Birthday Party type of invitation card are based on a layout, such as Frames, Portal, or Radius. When you click one of these templates, the Page Size and Layout settings in the Options area in the right pane are available, so you can change them.

The Page Size option determines whether your publication will occupy a quarter page or a half page, with the crease on the top or on the side. The Layout option determines which page layout will be applied to the card. You can change the page size and customize the layout after you have created the card, but with so many options to choose from, you can save time by choosing the template that is closest to the effect you want.

If you click a layout template and then change the Page Size option, most of the layout thumbnails in the center pane change to reflect the size you selected. If you change the Layout option, most of the thumbnails change to reflect the layout you selected. In this way, you can get a good idea of the range of possibilities. (A few layout templates are fixed and don't change when you select a different option.)

> **Tip** Each time you open a new instance of the Getting Started window, it displays the template thumbnails with the default settings. You can experiment with changes to the color scheme, font scheme, page size, and layout until you find the combination you want.

Every publication, even a blank one, has a color scheme, a font scheme, and a set of information associated with it. You can change these options after you create a publication, but you can save time by specifying all three at the time of creation.

Changing the Color Scheme

A color scheme consists of eight complementary colors designed to be used for the following elements of a publication:

- The Main color is for the text.
- The Accent 1 through Accent 5 colors are for objects other than text.
- The Hyperlink color is for indicating hyperlinks that have not been clicked.
- The Followed Hyperlink color is for indicating visited hyperlinks.

Understanding color schemes can help you create professional-looking publications that use an appropriate balance of color. You are not limited to using the colors in a publication's color scheme, nor are you limited to using the color schemes that come with Publisher, but because they have been selected by professional designers based on good design principles, using them ensures that your publications will be more pleasing to the eye.

The Color Scheme list in the Customize pane that appears when you select a publication type displays four of the eight colors in each scheme—Accent 1 through Accent 4—to give you an idea of the feeling evoked by that combination of colors. (By default, the Main text color is always black.) When you find the color scheme you want, clicking it changes the color scheme not only of the selected thumbnail but of all the thumbnails in the center pane.

After you create a publication, you can switch to a different color scheme by clicking Color Schemes in the Format Publication task pane. (If the task pane is closed, you can click Color Schemes on the Format menu to open it with the color scheme list displayed.)

> **Tip** If none of the color schemes is exactly what you are looking for, you can create your own by selecting a starting color scheme (preferably one that is close to what you want), clicking Create New Color Scheme at the bottom of the Color Schemes pane, and then choosing colors in the Create New Color Scheme dialog box. After you save the scheme with a name of your choosing, it appears at the top of the Color Schemes list both in the Format Publication task pane and in the Getting Started window, and you can apply it to any publication in the usual way.

Color Models

On the Standard tab of the Colors dialog box, you can select from 127 colors presented in a honeycomb spectrum and a 15-shade grayscale.

On the Custom tab of the Colors dialog box, you can select from the following three color models and then specify a color either visually by dragging a crosshair across a spectrum or by entering values in boxes:

- ***RGB***. This model is a method of creating colors by using combinations of red, green, and blue. The model is linked to the development of the cathode ray tube (CRT), which was for many years the standard technology used in televisions and computer monitors.
- ***HSL***. This model analyzes a color in terms of its position in the rainbow (hue), its purity or vividness (saturation), and its brightness (luminance). Essentially, saturation is a measure of the amount of white added to the hue, and luminance is the measure of the amount of black added to the hue.
- ***CMYK***. This model is a method of creating colors by using combinations of cyan (bluish-green), magenta (purplish-red), yellow, and black. Before the advent of digital printing, almost all colored printing involved a printing process that uses four plates to print the four CMYK colors in such a way that they are perceived as other colors. Because this color model is closely tied to this printing process, cyan, magenta, yellow, and black are also known as ***process colors***.

On the PANTONE tab of the dialog box, you can specify a color from the ***Pantone Matching System (PMS)***. This proprietary system was developed by Pantone, Inc. to give designers in color-critical industries such as publishing, packaging, decorating, and architecture the means to communicate with printers and manufacturers. This system uses sheets of numbered color swatches to identify colors created with precise amounts of pigment. For example, the purple color used in official materials produced by our company, OTSI, is PMS 520 C. (The *C* stands for *Coated*, meaning the color that results when PMS 520 is used on coated, or shiny, paper.) Because Pantone colors are premixed to one ink or dye, they are sometimes referred to as ***spot colors***.

As a general rule, you can use the RGB or HSL color model for publications designed to be viewed on the computer screen or digitally printed. Use the CMYK or Pantone color model for publications that will be commercially printed in large quantities or that require specific color matching.

Using Non-Color-Scheme Colors

Although working with the eight colors of a harmonious color scheme simplifies the process of designing a publication, you might want to use a larger palette of colors. You can add colors that are not part of the color scheme by selecting the element whose color you want to change and then choosing from the almost infinite spectrum of colors available from the Colors dialog box.

After you use a non-color-scheme color in a publication, it becomes available on all the palettes that appear when you click buttons that apply color—for example, the Font Color button on the Formatting toolbar. The color remains on the palettes associated with the publication—even if you stop using the color or change the color scheme applied to the publication.

Choosing Text

Most publications that you create based on Publisher templates will include placeholders for text. The placeholder text might be suggested wording or simply indicate the type of information to insert in that text box. When you create an invitation, Publisher suggests text that is appropriate to the invitation template you choose. You can change the text to your own words, or choose from approximately 150 two-part verses (in 23 occasion-specific categories, including business, personal, and holiday occasions) designed to adorn the cover and interior of a folded card.

In this exercise, you will create a folded card based on a layout template. You will change the color scheme before and after you create the publication, change the verse, apply different colors, and change the stacking order of elements on the page.

USE the *FoldedCard* publication. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PublisherCards* folder.

BE SURE TO display the Getting Started window before beginning this exercise.

1. In the **Publication Types** list, click **Invitation Cards**, and then scroll the center pane to get an idea of the range of publications available.
2. In the category list, click **Party**, and then in the **Party** category, click (don't double-click) the **Blends** thumbnail.

Notice in the right pane that the Page Size and Layout options are unavailable (gray), indicating that this is a general design template rather than a layout template.

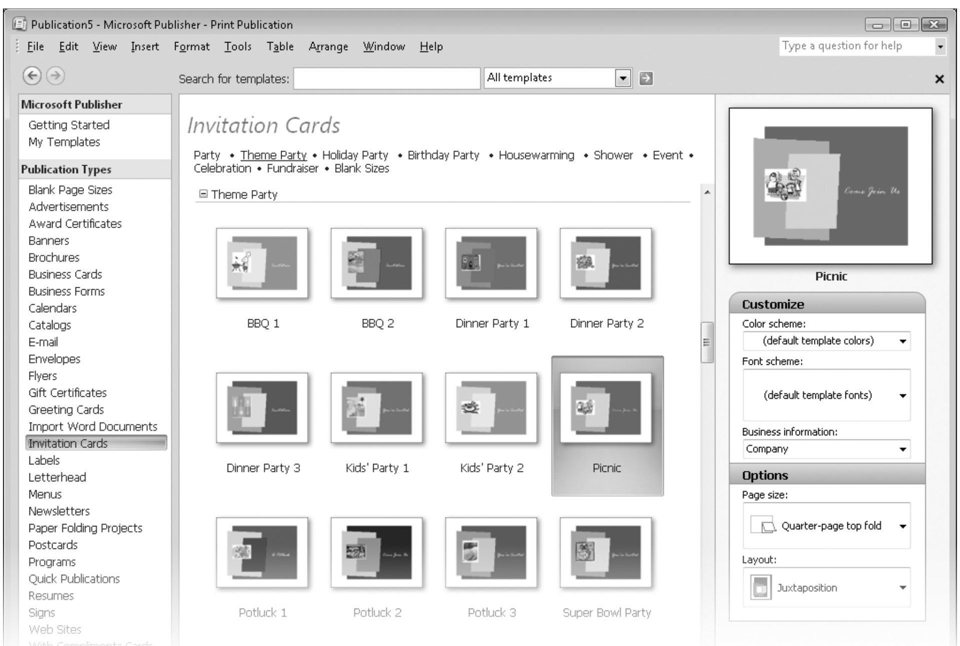
3. In the category list, click **Theme Party**, and then in the **Theme Party** category, click the **Picnic** thumbnail.

   Notice in the right pane that the Page Size and Layout options are available, indicating that this is a layout template.

4. In the **Options** area in the right pane, click the **Page size** arrow, and then in the list, click **Quarter-page top fold**. Then click the **Layout** arrow, and toward the top of the list, click **Juxtaposition**.

   The preview thumbnail changes as you select each option.

5. Scroll the center pane, and notice that Publisher has applied your choices to the thumbnails of all templates that do not have a fixed layout.



6. In the **Customize** area in the right pane, click the **Color scheme** arrow, and scroll through the list, noting all the different options.

7. Toward the bottom of the list, click **Oriel**, and then scroll the center pane.

   Publisher has applied the Oriel color scheme to all the templates.

8. In the **Party** category, double-click the **Blocks** thumbnail.

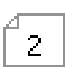
   Publisher creates an invitation card divided into four pages (the front of the card, the inside spread, and the back of the card). The publication reflects the Oriel color scheme you selected, but because Blocks is a design template, the publication is a half-page side-fold card instead of the quarter-page top-fold orientation that you selected in step 4. The Format Publication task pane displays options for refining the layout and formatting of the publication.

   > **Tip** Although you cannot change the orientation and size of this design template in the Getting Started window, you can change them after you create the card by clicking Change Page Size in the Format Publication task pane to display the Page Setup dialog box. Be aware however, that the layout of this design is tailored specifically to a vertical half-page card. If you change the orientation or size, you will need to manually adjust the layout to fit your selection.

   If you saved text in an information set earlier in the chapter, your organization name appears on page 1 above the invitation verse, and on page 4.

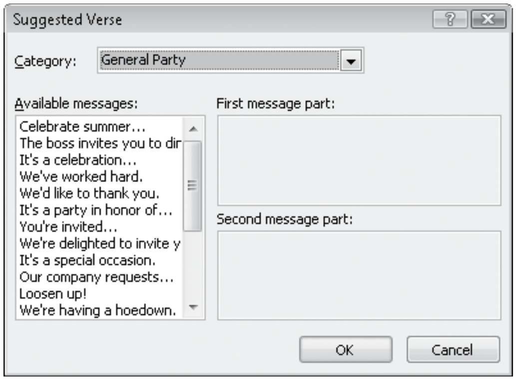
   > **Troubleshooting** Information inserted from an information set is indicated by a blue dotted underline. The dotted underline is an on-screen indicator, and will not be printed.
   >
   > The information set does not automatically replace the placeholder text in templates that you download from Microsoft Office Online. To replace or update a placeholder with text or a logo saved in an information set, point to the placeholder, click the smart tag that appears, and then click Update From Business Information Set.

   See Also For information about information sets, see "Storing Personal and Company Information" earlier in the chapter.


Page 2

9. On the page sorter, click the **Page 2** button to display pages 2 and 3.
10. In the **Format Publication** task pane, in the **Invitation Options** area, click **Select a suggested verse**.

    The Suggested Verse dialog box opens.



11. Click the **Category** arrow and scroll the list of options to see what's available. Then click **General Party**, and in the **Available messages** list, click **We've worked hard.**

    Publisher displays the message text that will appear on the front page of the card in the First Message Part window, and the text that will appear inside the card in the Second Message Part window.

12. Click **OK** to insert the selected text.

    The messages on pages 1 and 3 change to reflect your choice. You can customize the messages and the other text on the card to suit your needs. In this exercise, we will focus on adjusting the color.

13. Display page 4.

14. In the **Format Publication** task pane, click **Color Schemes**, and then click various color schemes, observing the effect on the card to the right.

    Notice that the first color in each scheme (Accent 1) is always assigned to the vertical block at the right edge of the card, the second color (Accent 2) is assigned to the middle panel, and the fourth color (Accent 4) is assigned to the left panel.

15. In the **Apply a color scheme** list, click **Harbor**.

16. Display page 2, and then click **Now, let's party!**

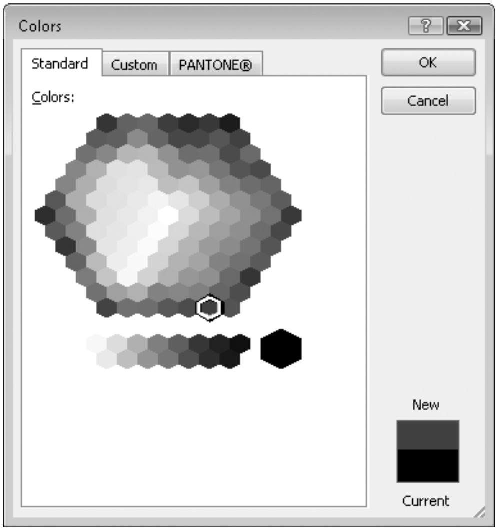
> **Troubleshooting** If clicking the text doesn't select it all, click in the text box and then press Ctrl+A.


Font Color

17. On the **Formatting** toolbar, click the **Font Color** arrow, and then click **More Colors**.

    The Colors dialog box opens with the Standard color spectrum displayed.

18. In the **Colors** spectrum, click the dark red hexagon.




Format Painter

19. Click **OK**. Then with the text still selected, on the **Standard** toolbar, click the **Format Painter** button once.

> **Tip** Format Painter is a nifty tool that allows you to copy multiple formatting characteristics from one element to another. To copy formatting to only one element, click the Format Painter button once. To copy formatting to multiple elements, double-click the Format Painter button. The feature will then remain active until you either press the Esc key or click the Format Painter button again.

20. In the center square, click **INVITATION TITLE**.

    The text changes to the same font, color, and size as the text in the right square.


Decrease Font Size

21. On the **Formatting** toolbar, click the **Decrease Font Size** button three times, and then click a blank area of the publication to see the results.
22. In the center of the page spread, click the large square containing the invitation details once.

    Publisher selects the grouped objects on the page spread.
23. Click the square a second time.

    Publisher selects only the large square, as indicated by the gray handles.

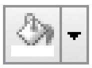

Line Color

24. On the **Formatting** toolbar, click the **Line Color** arrow.

The dark red color you applied in step 19 from the Colors dialog box appears on the palette below the eight scheme colors.

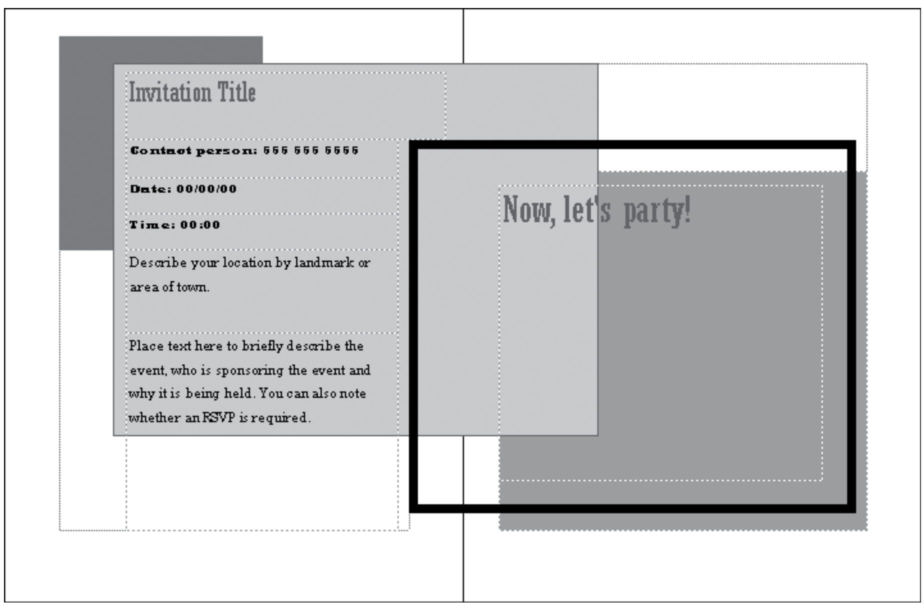
25. Click the **Dark Red** box.

As you can see, the non-color-scheme color is available for use with all color formatting tools.


Fill Color

26. Click the bottom or right edge of the gray square on page 3 twice to select it (not the heavy black outline). Then on the **Formatting** toolbar, click the **Fill Color** arrow, and click the sixth color box (**Hyperlink**).

> **Tip** Pointing to a color displays the purpose and the name or value of the color in a ScreenTip.



27. Open the *FoldedCard* practice file from the *Documents\Microsoft Press\2007OfficeSBS\PublisherCards* folder to see further examples of the types of changes you can make. Then use what you have learned about color to enhance the card in various ways.

CLOSE the open publications without saving your changes.

The Impact of Color

If you are creating publications for business purposes, bear in mind that the colors you use are just as important as the text and graphics. Different colors can send different messages. For example, "cool" colors such as green, blue, and violet are associated with water and pastoral settings and can imply peace and tranquility. On the other hand, "warm" colors such as red, orange, and yellow are associated with fire and can imply energy and intensity, or even aggression.

Be aware of these factors when selecting colors for a publication:

- Cool colors tend to recede and are ideal as background colors. Warm colors tend to advance and are good for calling attention to a specific object.
- Bright colors tend to bring objects forward visually. Muted or darker colors tend to make objects recede.
- Placing colors with the same intensity, such as red and green, next to each other can make it hard for some people to distinguish the objects.
- Color can be used to highlight information, but be careful about the implications of some colors. For example, red is commonly used for negative numbers.
- Using too many colors is distracting and creates a hodge-podge where no particular object stands out on the page.

Creating Postcards

Using postcards is a simple way to send information to customers, club members, family, or friends. Publisher comes with many templates for two-sided postcards. Most are designed to occupy a quarter page, but a few have quarter-page or half-page options. All have a primary side called Side 1 and a secondary side called Side 2, with most of the layout options for the second side including space for an address and postage.

Printing Both Sides of Thick Paper

Before you create a two-sided publication such as a postcard, you need to decide how you will print it. Because postcards are designed to be mailed, the paper they are printed on has to be substantial enough to withstand sorting and bagging processes without crumpling or tearing.

If you want to print only a few cards, you can buy postcard paper, also called ***card stock***, at an office supply store and try printing your publication yourself. Costs vary enormously depending on the quality of the paper, its size, its color, and whether it is has a preprinted design. But at the cheap end of the scale, you can figure on about $0.12 per card.

To print on both sides of the paper, either you need a printer that supports ***duplex*** printing or you need to print Side 1, flip the paper over, and then print Side 2. Before you take the second route, you should run the Two-Sided Printing Setup Wizard to ensure that you correctly feed the paper; otherwise you might end up with both Side 1 and Side 2 printed on the same side of the card, or printed with different top sides. To run the wizard, click Print on the File menu, and under the Preview box in the Print dialog box, click Show How To Insert Paper. Then click Run The Two-Sided Printing Setup Wizard.

> **Important** Depending on your printer, you might need to manually feed each sheet of card stock rather than loading up your paper tray with multiple sheets. Some printers handle card stock better than others, and just because your printer successfully prints on one side, you shouldn't assume it will successfully print both sides. Card stock that has been through a printer once might jam because of curling, or the ink from the first side might be picked up by the printer's roller and transferred as a shadow to the second side. So be sure to run tests with regular paper and then with one sheet of card stock before printing many postcards.

If you want to print many postcards and printing them yourself is not an option, you can take your publication to a copy or print shop. However, if cost is an issue, be sure to check prices first. A sheet of four double-sided postcards will cost you as much as $2.20 each on regular card stock or $2.40 each on shiny photo paper. Cutting the sheets into four is an additional cost. If you don't need the postcards within the day, you can upload your publication to an online print shop to save a bit of money.

Online Printing Services

Several printers who specialize in printing cards and postcards offer their services on the Web. Some of these Web sites are intuitive to use and provide cost calculators to give immediate pricing for exactly the number of postcards you need. A few options include:

- iPrint (*www.iprint.com*)
- 48HourPrint (*www.48hourprint.com*)
- PrintingForLess (*www.printingforless.com*)
- MyPrintShopOnline (*www.myprintshoponline.com*)
- FedEx Kinko's Print Online (*www.fedex.com/us/officeprint/main/*)

Online printing services can be remarkably inexpensive compared to brick-and-mortar shops. Some online vendors also offer shipping services, so you can upload your publication and an address list and leave the rest to them.

Using Mail Merge

If you communicate with customers or members of an organization by means of postcards and other marketing pieces that are sent to everyone on a mailing list, you might want to use a process called ***mail merge***. This process combines the static information in a publication with the variable information in a ***data source*** (a mailing list or any other type of database) to create one copy of the merged publication for every record in the data source.

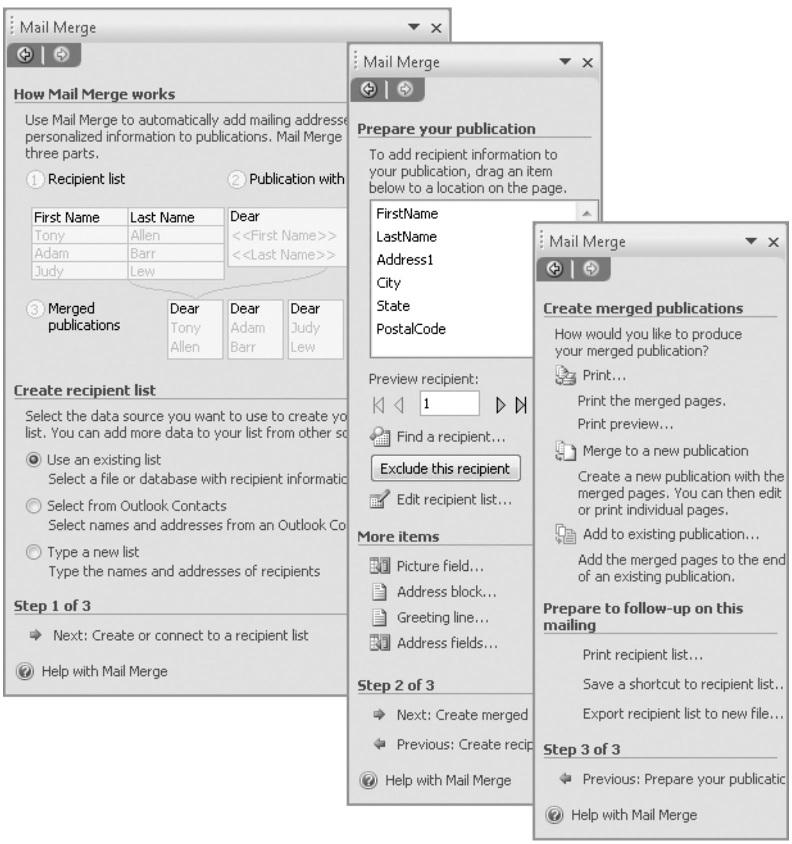
The data source is a structured document, such as a Microsoft Office Word table, a Microsoft Office Excel worksheet, a Microsoft Office Access database table, or a Microsoft Office Outlook contacts list. You can use an existing data source, or you can create a new one as part of the mail merge process.

To tell Publisher what information to pull from the data source and where to put it, you insert ***data fields*** into the publication. These fields correspond to the field names (usually the column headings) in the data source. For example, the address area of

a postcard usually contains an address block consisting of fields for the name and address of each recipient. After you enter the fields in the publication, each field is enclosed in ***chevrons***; for example, «FirstName».

After you specify the data source you want to use and insert the appropriate data fields into the publication, you can either send the merged publications directly to the printer or you can merge them one after the other into a new publication, as separate pages. If you merge to a new publication, you have another chance to review and, if necessary, edit the merged copies before sending them to the printer.

This might sound like a complicated process, but Publisher makes it simple with the Mail Merge Wizard, a three-step wizard that leads you through the mail merge process from start to finish.



Catalog Merge

Publisher offers several booklet-style catalog templates into which you can insert product information. If this information is stored in an Excel workbook or an Access database, you can use catalog merge to merge the product information into the catalog publication at printing time.

Catalog merge works pretty much the same way as mail merge. You can link to an existing data source or create a new one. When using an existing data source, you can filter the information or exclude specific records. This means you can tailor each printing of the catalog—for example, for a particular occasion or season.

If you frequently use catalogs as a marketing tool, it is worth taking the time to set up your product or service information in a workbook or database so that you can maintain it in one location and avoid having to retype it every time you need it. You might even consider storing information such as team or membership lists this way so that you can use Publisher and catalog merge to produce professional looking rosters.

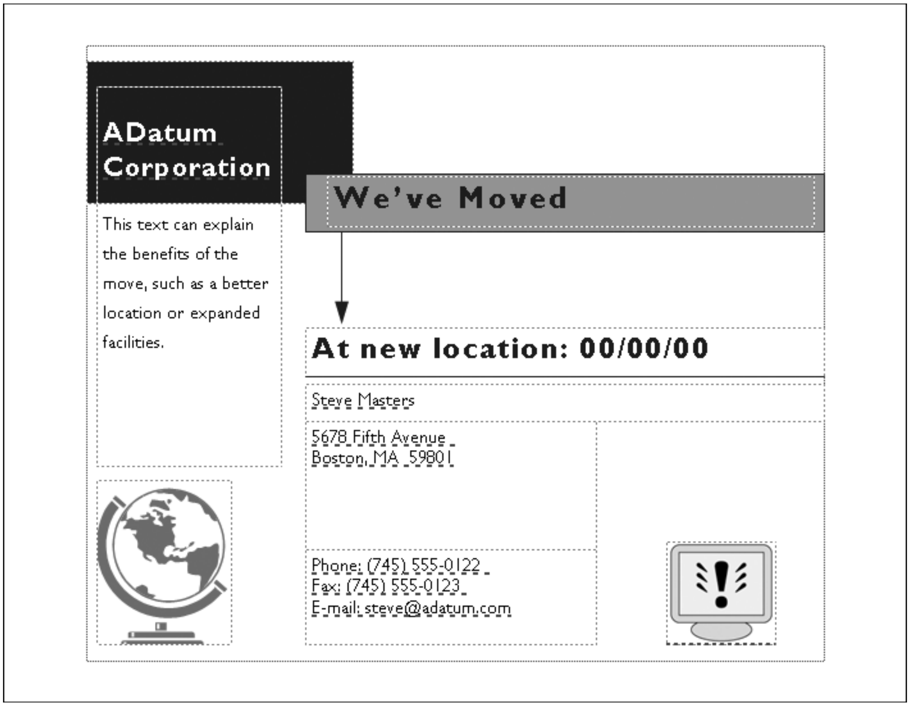
In this exercise, you will create a postcard, insert data fields based on an existing data source, and then perform a mail merge operation to create copies with preprinted names and addresses, ready for mailing.

USE the *DataSource* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PublisherCards* folder.

BE SURE TO display the Getting Started window before beginning this exercise.

1. In the **Publication Types** list, click **Postcards**, and scroll the center pane to see the available templates. In the category list, click **We've Moved**, and then click the **Compass Point** thumbnail.
2. In the **Customize** area in the right pane, change the **Color scheme** to **Sapphire**, and in the **Options** area, change the **Side 2 information** to **Promotional text**. Then click **Create**.

   Publisher creates the postcard. If you have saved text in an information set, your organization information appears on both sides of the postcard. You can customize the postcard using the techniques you learned in "Creating Folded Cards," earlier in this chapter.



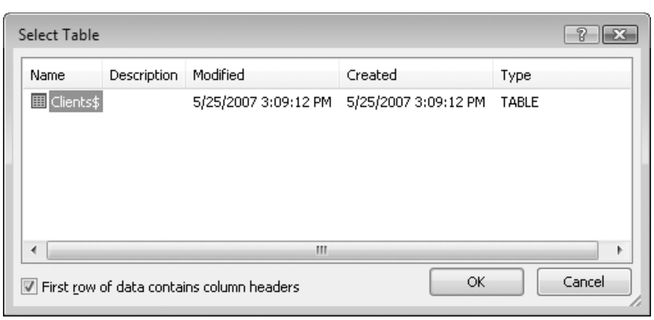
3. Display page 2. Then on the **Tools** menu, point to **Mailings and Catalogs**, and click **Mail Merge**.

   Step 1 of the Mail Merge Wizard appears in the Mail Merge task pane.

4. With the **Use an existing list** option selected under **Create recipient list**, click **Next: Create or connect to a recipient list** at the bottom of the task pane.

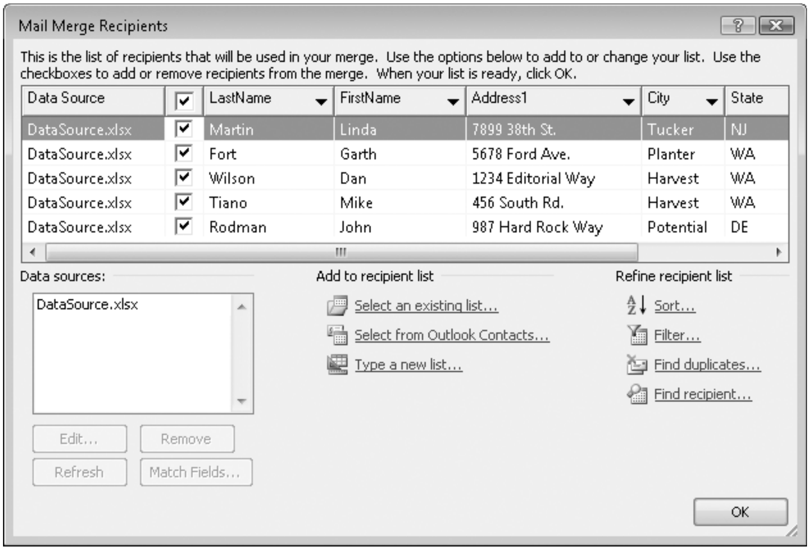
5. In the **Select Data Source** dialog box, navigate to the *Documents\Microsoft Press\2007OfficeSBS\PublisherCards* folder, and double-click the *DataSource* workbook.

   The Select Table dialog box opens.



6. With the **Clients$** sheet and the **First row of data contains column headers** check box selected, click **OK**.

   The Mail Merge Recipients dialog box opens.



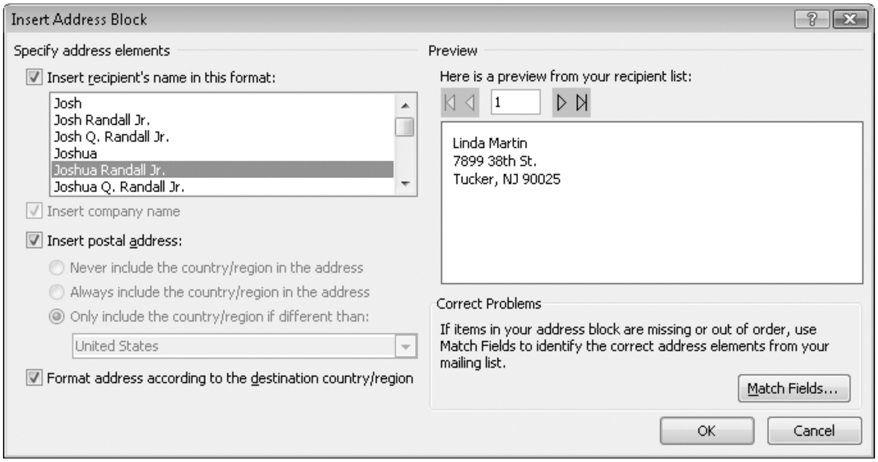
   If you use mail merge often, you will want to explore this dialog box to see how you can refine the mail merge process. For the purposes of this exercise, we will use the default settings.

7. In the **Mail Merge Recipients** dialog box, click **OK**.

   Step 2 of the Mail Merge Wizard appears in the Mail Merge task pane, so that you can add data fields to your publication.

8. In the postcard, click **Type address here** to select all the text in the address text box, and press the Del key. Then under **More items** in the task pane, click **Address block**.

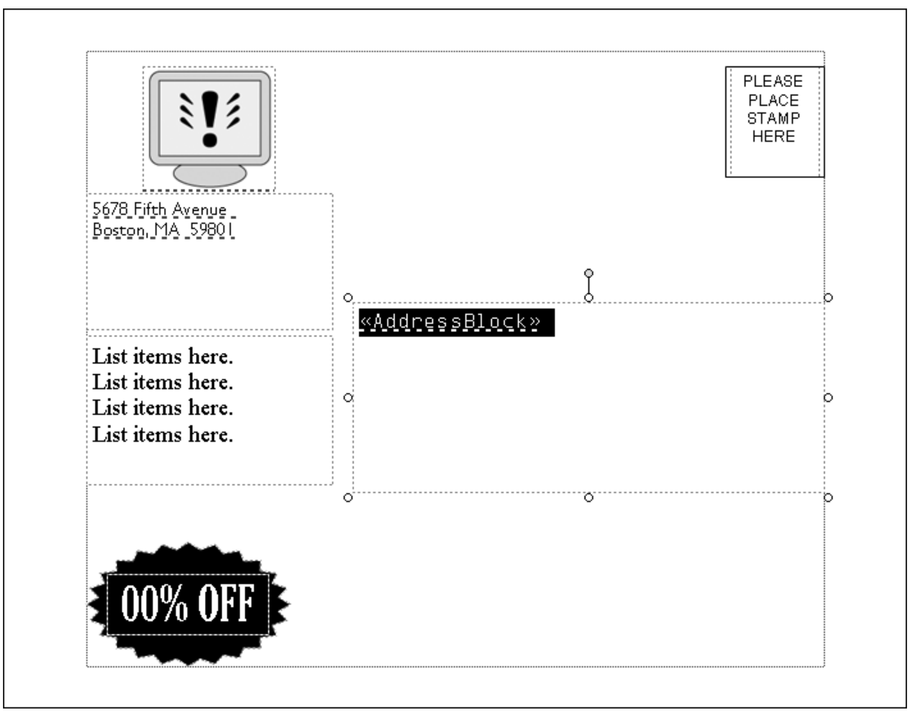
   The Insert Address Block dialog box opens. From this dialog box, you can refine the format of the fields that constitute the name and address.



9. Click **OK** to accept the default settings.

   Publisher inserts the name and address of the first client in the data source into the text box.

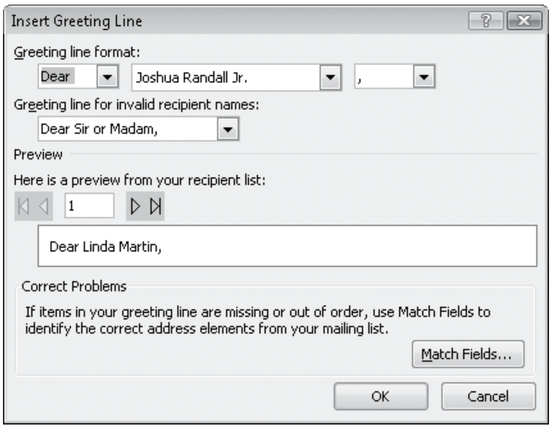
10. To see the underlying data field, click the client's name.



11. Display page 1, and insert a new text box below the **We've Moved** box.

12. Under **More items** in the task pane, click **Greeting line**.

    The Insert Greeting Line dialog box opens so that you can specify how the greeting line should appear in the merged postcards.



13. Under **Greeting line format**, click the arrow to the right of the first box, and click **(none)**. Then click the arrow to the right of the second box, and toward the bottom of the list, click **Joshua**.

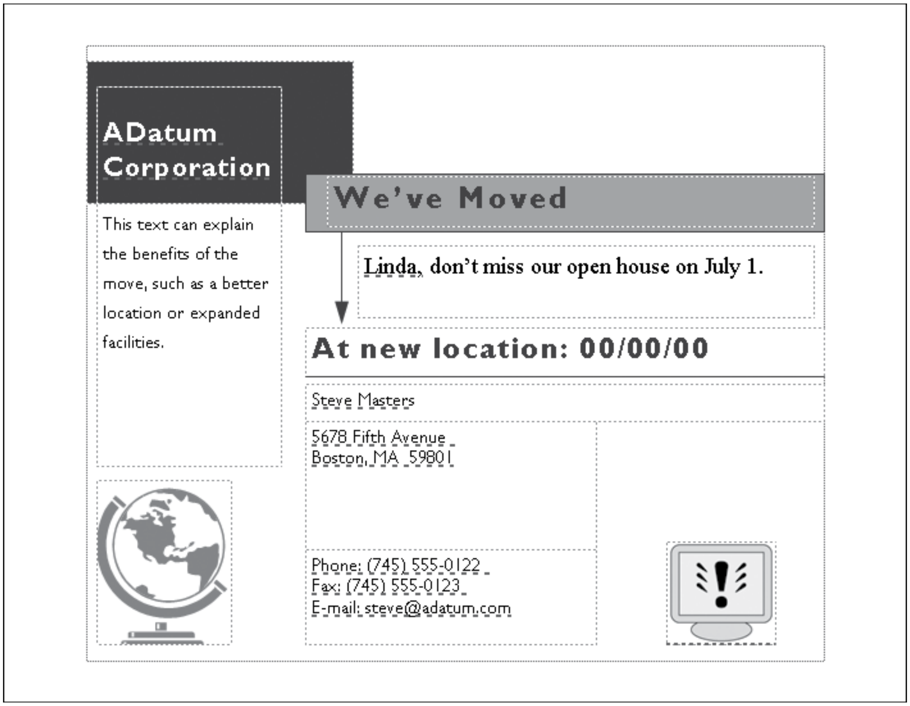
14. Under **Greeting line for invalid recipient names**, click **(none)**. Then click **OK**.

    Publisher inserts the greeting line as it will appear for the first record in the data source file.

15. Click after the inserted comma (the name changes to display the data field), press Space, and type **don't miss our Open House on July 1.** Then click away from the text box.

> **Troubleshooting** If <<GreetingLine>> is selected when you start to type, it will be overwritten by the first new character. If this happens, undo the change or delete the contents of the text box, and repeat steps 13 through 15, this time ensuring that the insertion point is after <<GreetingLine>>.

The postcard is now ready for merging.



16. At the bottom of the **Mail Merge** task pane, click **Next: Create merged publication**.

Step 3 of the Mail Merge Wizard appears in the Mail Merge task pane.

17. In the task pane, click **Merge to a new publication**. Then on the page sorter, click each page in turn to see the results.

Publisher creates a publication that contains a personalized copy of the postcard for each of the five records in the data source. You can edit each copy as necessary in this publication before printing it. You can also save the publication for future use.

CLOSE the publication without saving your changes.

Bulk Mail

If you do frequent large mailings of promotional materials or newsletters, you might want to look into ***bulk mail***. The post office discounts the regular cost of postage to a bulk rate if your mailings are large enough (at least 500 pieces) and if you do some of the work necessary to sort and transport them.

To use bulk mail, you need to buy a permit ($175 a year as of this writing) from the bulk mailing center where you will deliver your mailings. You need to set up your publications within certain size and shape guidelines and either print postage permit information on the publications or use a postage meter. In addition, you need to maintain an accurate address list and sort and bundle your mailings by ZIP Code. In return for all that work, you can realize savings of at least $0.05 per piece, depending on the degree to which your mailings can be automated.

You can find out more about bulk mail and how to evaluate whether your mailings are worth the setup work by visiting

www.usps.com/businessmail101/

Tip Some copy and print shops provide ***direct mail*** services, meaning that they will merge your publication and data source while printing, sort the printed pieces, and then deliver them to the post office, ready for bulk mailing.

Creating Calendars

Although various technologies are now available to track appointments and schedules electronically, many people still prefer to use printed calendars to keep them organized and on time. Calendars can be an excellent promotional item because they keep your information in front of the recipient for the entire calendar period. You can include information about promotions and events, or if you create a calendar for friends and family members, you can include information about personal events such as birthdays. You can use Publisher to create a calendar for one month, for a range of months, or for an entire year. Various designs are available in full-page or wallet sizes, or you can build a custom-sized calendar from a blank publication.

After you choose a calendar template in the Getting Started window, you can specify whether each calendar page displays a month or a year, and which months or years the calendar includes. (If you don't select a year, Publisher creates a calendar for the current year.) Publisher creates a calendar consisting of one page specific to each month or year in the selected range. For example, setting a starting month of January and an ending month of June of the same year produces a six-page publication. You can also add a Schedule Of Events section, which is a text box next to the calendar grid on each page in which you can insert information. You can change the text box header to represent information other than events.

Adding Captions, Credits, and Copyrights

Some calendar templates include placeholders for photographs or other artwork. If you are creating a calendar for distribution to other people and you select one of these templates, think carefully about the ownership of the artwork you plan on using. If you insert your own photographs, do you want to indicate ownership in some way? If you plan to use artwork created by other people, do you have the right to distribute those materials without infringing on the owner's rights?

Many people assume that if a graphic is available on the Web, it is part of the ***public domain***. However, it is wise to err on the side of caution whenever you use artwork in your publications, unless you know it is not protected by a ***copyright***. For example, the clip art that comes with Publisher and that is available from Microsoft Office Online is not copyrighted and can be used by anyone for any purpose. Materials that are copyrighted are usually accompanied by a variation of the following statement:

Copyright © 2008 by Online Training Solutions, Inc. All rights reserved.

If you want to use artwork that you have been given by someone else, it is wise to acknowledge the source. Otherwise, hard feelings can result if it appears to the owner that you are trying to claim credit for his or her work. You can add captions, credits, and copyrights to your publications in unobtrusive text boxes, so don't be tempted to omit them only because you think they might detract from your design.

Changing the Background

In Publisher, you can customize the background of any page by adding a solid color, a color gradient, a texture, or even a picture. This type of formatting is particularly effective in full-page publications such as calendars, because the background holds the objects on the page together with a cohesive design element.

A color gradient is a visual effect in which a solid color gradually changes from light to dark or dark to light. Publisher offers several gradient patterns, each with several variations. You can also choose a preset arrangement of colors from professionally designed backgrounds in which different colors gradually merge.

> **Tip** Be cautious when using preset color arrangements with calendars. It is important that the background be subtle and that it not compete with the other objects for attention or make them unreadable.

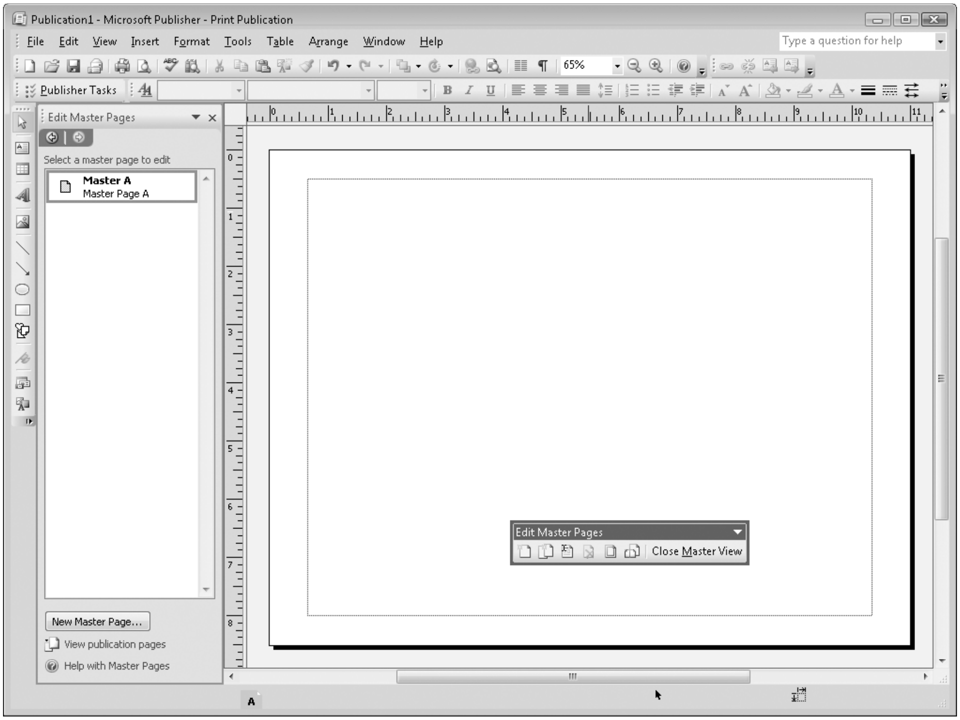
If you want something fancier than a gradient, you can give the background a ***texture***, or you can even use a picture. Publisher comes with several textures that you can easily apply to the background of your pages.

Working with the Master Page

When you create a publication, the pages take on the characteristics of the template on which it is based. You can then make changes to individual pages. In a multi-page publication, making the same change to the design of every page can be tedious. For efficiency and precision, you can make the change to the publication's ***master page*** instead.

The design of the master page controls the look of all the pages in the publication. Anything that appears on the master page appears on every page. Most master page elements can be changed only on the master page. (An exception is the background; you can override a master page background on an individual publication page.) For this reason, most publications created with Publisher templates have a blank master page—the design elements are individually inserted on each page so that you can easily change them.

To make changes to a publication's master page, you click Master Page on the View menu to display the page, the Edit Master Pages task pane, and the Edit Master Pages toolbar.



By clicking buttons on the toolbar, you can do the following:

- Add a new master page.
- Duplicate or rename the active master page, or delete it if there is more than one.
- Add layout guides to the active master page.
- Display spreads or single pages.

Clicking the Close Master View button on the toolbar returns you to the publication. You can temporarily display the publication's pages to check the effects of a change by clicking View Publication Pages at the bottom of the Edit Master Pages task pane.

While the master page is displayed, you can choose commands from menus and click buttons on toolbars to insert and format the elements you want to appear on every page of the publication. For example, you might want to add your company logo or a watermark to every page.

In this exercise, you will first create a full-page calendar for the entire year, with a custom photograph and copyright statement. You will then create a 12-page calendar with a schedule of events for the current month, change the background of an individual page, and then change the background on the master page.

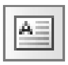
USE the *Arizona10* picture. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PublisherCards* folder.

BE SURE TO display the Getting Started window before beginning this exercise.

1. In the **Publication Types** list, click **Calendars**, and then scroll the center pane to see the broad range of available design templates.
2. In the **Full Page** category, click **Photo Album**.
3. In the **Customize** area in the right pane, set the **Color scheme** to **Aqua**. In the **Options** area, change the **Page size** to **Portrait** and the **Timeframe** to **One year per page**. Then click **Create**.

   Publisher creates a full-page, vertical, 12-month calendar based on the selected design template.

4. Zoom to **100%**, and scroll to the top of the page.
5. Right-click the existing picture, point to **Change Picture**, and then click **From File**. In the **Insert Picture** dialog box, navigate to the *Documents\Microsoft Press\2007OfficeSBS\PublisherCards* folder, and double-click the *Arizona10* picture.


Text Box

6. On the **Objects** toolbar, click the **Text Box** button, and then draw a text box below the photograph. Make it the width of the photograph and about a quarter inch high.
7. In the text box, type **Copyright (c) 2006 by Barry Preppernau. All rights reserved.**

> **Tip** When you press the Spacebar after typing *(c)*, Publisher substitutes the copyright symbol, because the Replace Text As You Type check box is selected in the AutoCorrect dialog box. For information about AutoCorrect, see "Editing and Proofing Content" in Chapter 22, "Creating Text-Based Publications."

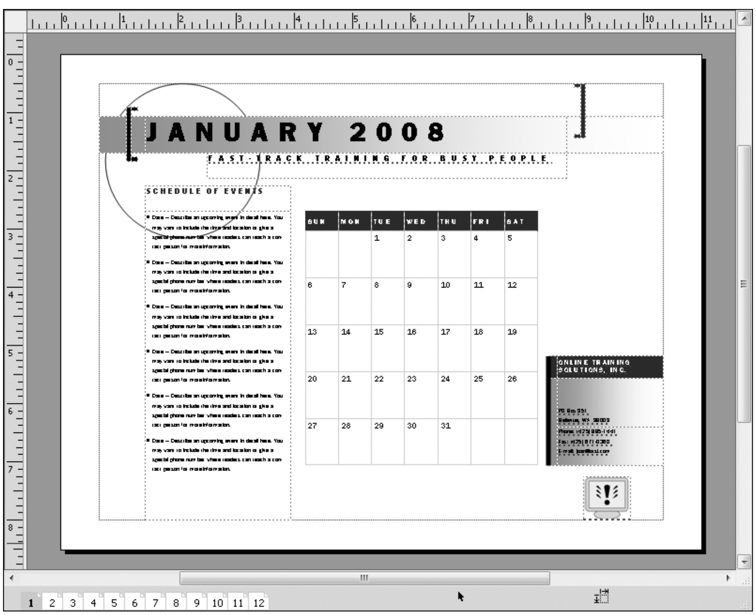
Because some text will not fit in the text box, Publisher displays the Text In Overflow button.


Decrease Font Size

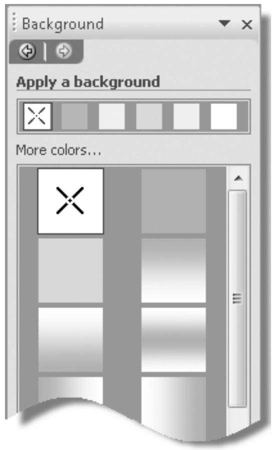
8. Press Ctrl+A to select all the text in the text box, and then on the **Formatting** toolbar, click the **Decrease Font Size** button until all the text you typed fits on one line. Then click an empty area of the page to see the results.

9. Repeat steps 1 through 3 to create a calendar that uses the Axis design and the Waterfall color scheme. In the **Options** area in the right pane, click **Set Calendar Dates**, set the **Start date** to **January** and the **End date** to **December**, and click **OK**. Select the **Include schedule of events** check box, and then click **Create**.

   Publisher creates a 12-page, horizontal calendar. (The one shown below uses a different information set.)



10. On the title bar of the **Format Publication** task pane, click the **Other Task Panes** button, and then click **Background** to display the **Background** task pane.



11. Click several options to see their effects on the calendar.

Clicking one of the color boxes at the top of the task pane changes the gradients at the top of the More Colors list to reflect that color. You can also apply any of the available textures, patterns, or pictures to the calendar's background.

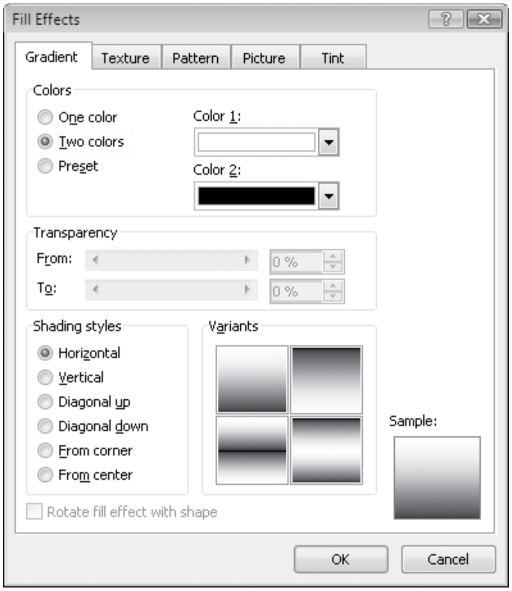
12. In the **Background** task pane, directly under **Apply a background**, click the **30% tint of Accent 1** (violet) box. Then click any gradient fill box in the list.

13. On the page sorter, click several pages to verify that the background was applied to only the first calendar page. Then redisplay page 1.

14. On the **View** menu, click **Master Page** to display the publication's underlying master page.

15. Display the **Background** task pane, and at the bottom, click **More backgrounds**. Then in the **Colors** area on the **Gradient** tab of the **Fill Effects** dialog box, click **Two colors**.

The Fill Effects dialog box changes to display the options for two-color gradients.



Tip You can also use the Fill Effects dialog box to apply a gradient fill to objects such as text boxes. Simply click the Fill Color arrow on the Formatting toolbar, and then click Fill Effects.

16. Click the **Color 2** arrow, and click the **Accent 2** (aqua) box. Then in the **Shading styles** area, click **From corner**, and in the **Variants** area, click the lower-left box. Click **OK**.
17. At the top of the **Background** task pane, click the **Other Task Panes** button, and click **Edit Master Pages** to display that task pane. Then at the bottom of the pane, click **View publication pages**. Then click various pages on the page sorter.

    The master page background has been applied to all the pages, but the background you applied directly to page 1 in step 12 is still visible in parts of that page.
18. Display page 1, display the **Background** task pane, and click the **No Fill** box at the top of the first column in the list.

    The additional background is removed from page 1 so that it displays the entire master page background.

CLOSE the open publications without saving your changes.

Packaging Publications for Printing

The simplest way to submit your publication to a copy shop, print shop, or online print service is as a ***Portable Document Format (PDF) file***. You can create a PDF file from Publisher without purchasing special software by installing the Microsoft Save As PDF Or XPS add-in from the Microsoft Office Online Downloads site. You can then use the Pack And Go command to create a PDF file that includes all the information a professional printer needs when printing your publication.

In this exercise, you will install the Microsoft Save As PDF Or XPS add-in, and then use the Pack And Go command to create a PDF file that you can submit to a printer.

USE the *Postcard* publication. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PublisherCards* folder.

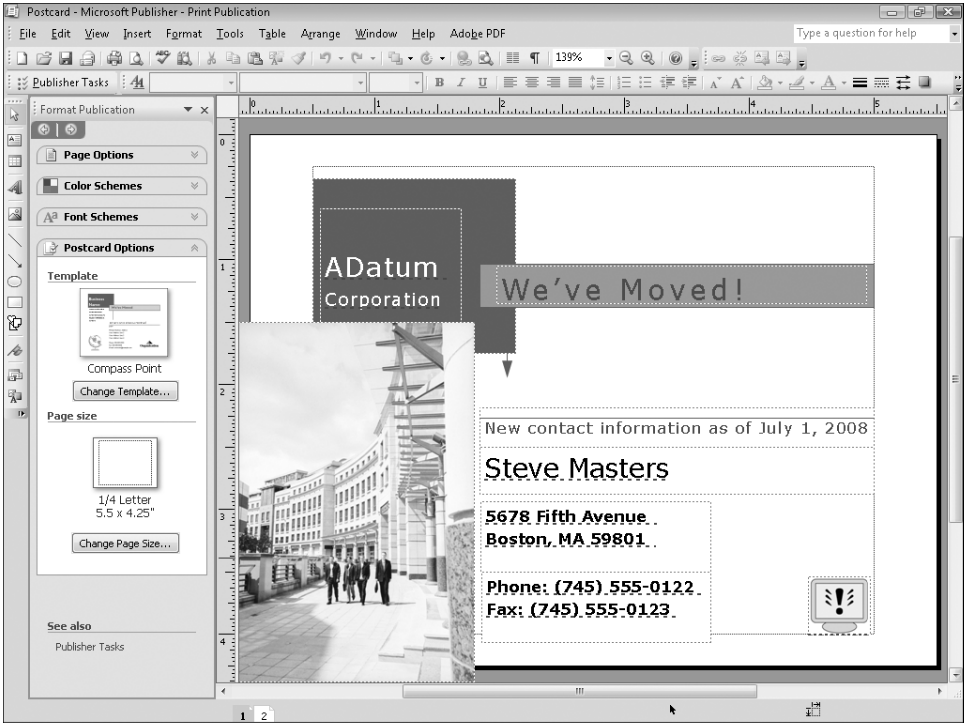
BE SURE TO have an active Internet connection before beginning this exercise.

1. Start your default Internet browser, and go to *office.microsoft.com/en-us/downloads/*.
2. In the left pane, under **By Version**, click **2007 Office System**, click **2007 Microsoft Office System**, and then click **Add-ins**.
3. In the list of add-ins, click **2007 Microsoft Office Add-in: Microsoft Save As PDF or XPS**.
4. On the installation page, click **Continue**. After the Genuine Advantage Tool confirms that you are running genuine, licensed software, click **Install** and follow the installation instructions given.

> **Troubleshooting** You might need to install the Genuine Advantage Tool before you can proceed.

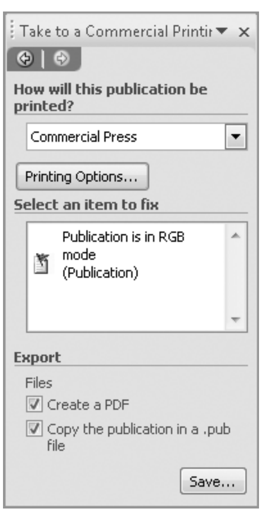
5. After the installation completes, navigate to the *Documents\Microsoft Press\2007OfficeSBS\PublisherCards* folder, and then double-click the *Postcard* publication.

   Notice that the graphic in the lower-left corner of this postcard extends beyond the active area of the publication; we'll explain why in a minute.



6. On the **File** menu, point to **Pack and Go**, and then click **Take to a Commercial Printing Service**.

   The Take To A Commercial Printing Service task pane opens. At the bottom of the pane, Publisher indicates that it will create both a PDF file and a .pub file when you click Save to complete the process.

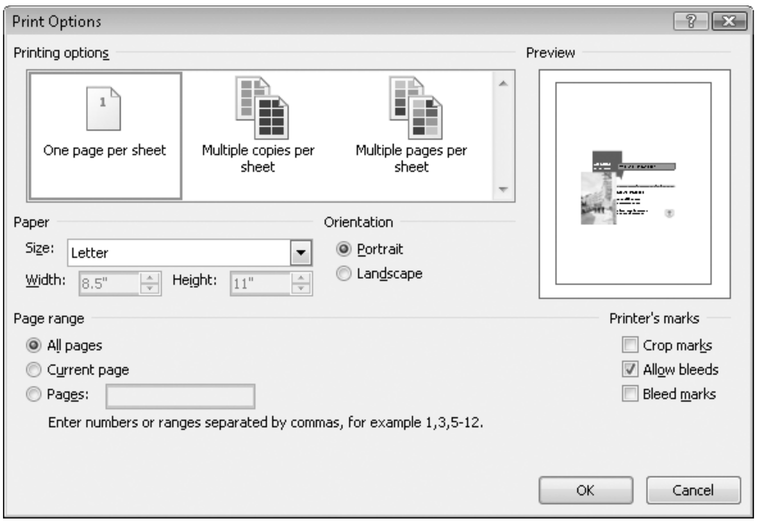


If you are going to print thousands of postcards by the four-color printing method, you need to change the publication from RGB color mode to CMYK color mode. But provided your local copy or print shop offers digital printing, you can ignore the issue flagged in the Select An Item To Fix box.

See Also For information about CMYK colors, see the sidebar titled "Color Models," earlier in this chapter.

7. In the task pane, click **Printing Options**.

   The Print Options dialog box opens.



   A copy or print shop might tell you to include crop marks or bleed marks in the PDF file. ***Crop marks*** are used when a publication is printed on a sheet of paper that is larger than the desired output. They appear in the four corners of a publication to indicate where the printer should trim the pages. A ***bleed*** is an element that appears to extend partially beyond the edge of the page, like the photograph in the lower-left corner of the postcard. The extent of the bleed is indicated by the ***bleed marks***.

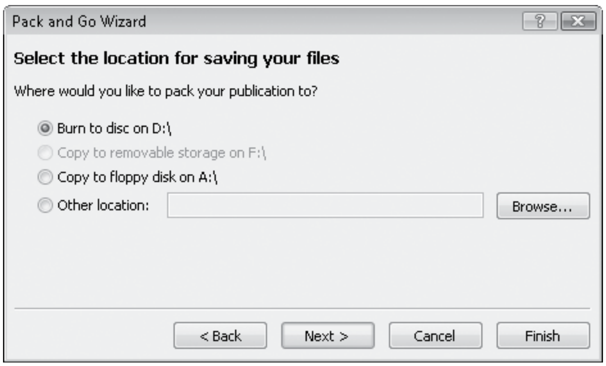
8. With **One page per sheet** selected in the **Printing options** box, click **OK**.

   The copy or print shop usually requires this setting for compatibility with its own printing software.

9. At the bottom of the task pane, click **Save**.

> **Troubleshooting** If you have not yet saved a publication, a message appears prompting you to do so. Click OK in the message box. Then in the Save As dialog box, assign a name to the publication, and save it in the *Documents\Microsoft Press\2007OfficeSBS\PublisherCards* folder.

The Pack And Go Wizard starts, and asks where you want to save the publication package.



10. Insert a blank CD in your CD burner, and with **Burn to disc on D:** (or the equivalent drive on your computer) selected, click **Next**.

If your computer does not have a CD burner, click the Other Location option instead, and then browse to the folder in which you want to store the package.

> **Tip** Publisher 2007 does not support the direct burning of content to a DVD. If you prefer to burn to a DVD rather than a CD, package your publication to a folder on your computer, and then use DVD-burning software to create the DVD.

11. When the wizard announces that your publication is successfully packed, clear the **Print a composite proof** check box, and then click **OK**.

Publisher creates a compressed file on the CD (or in the designated folder) containing a PDF file and a .pub file. You can take the compressed file to the copy or print shop for printing.

> **CLOSE** the open publications without saving your changes, and if you are not continuing on to the next chapter, exit Publisher.

Binding

If you want to produce a calendar as a give-away promotion for clients or as a gift for family and friends, you will probably want to print multiple copies of the calendar pages in color on stiff paper or card stock. As you prepare the calendar, bear in mind the issues discussed in "Creating Postcards" earlier in this chapter. With annual calendars, an additional consideration is the method you will use for binding the 12 calendar pages to create an attractive package.

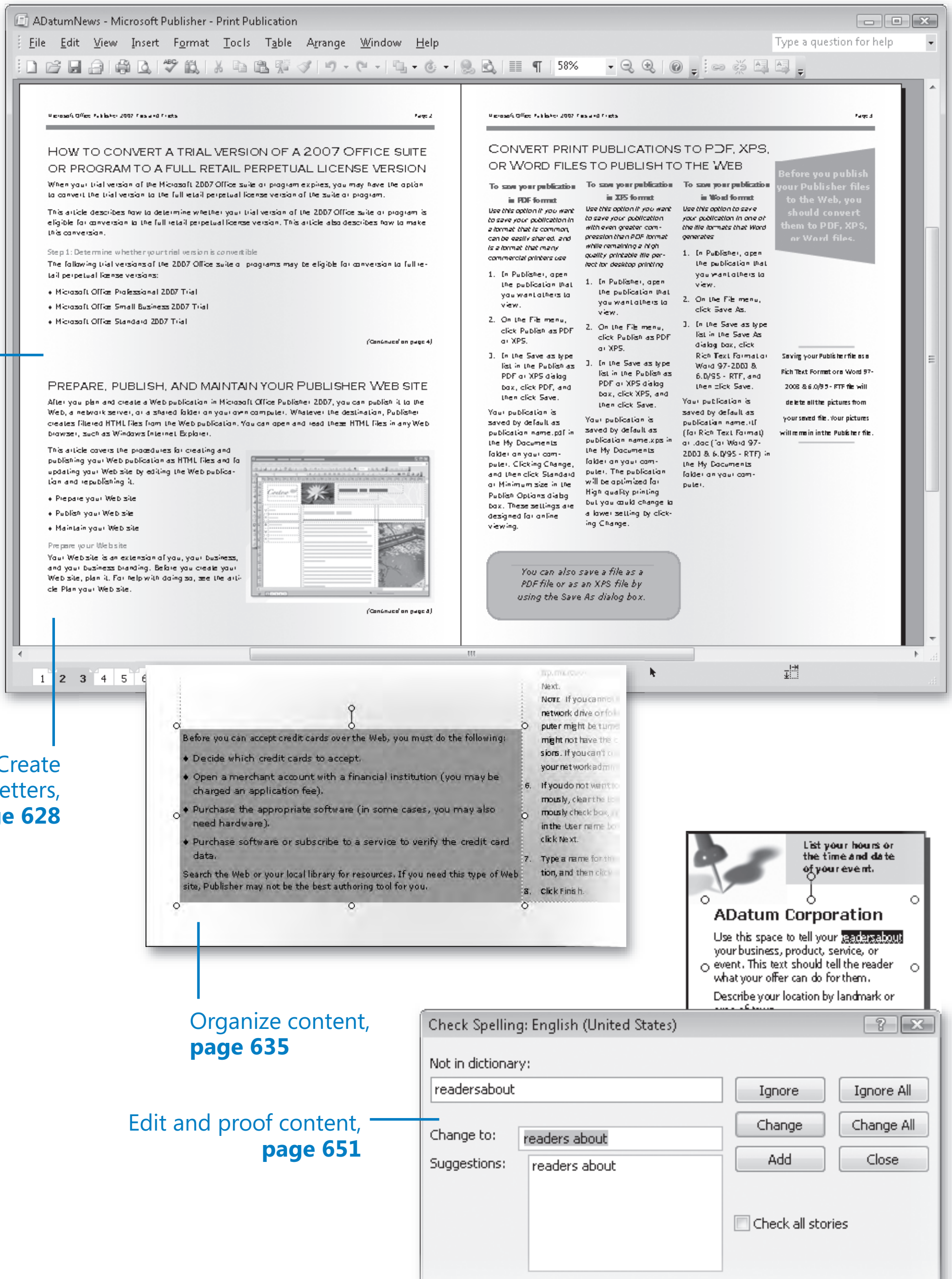
If you print your calendar at a copy or print shop, you usually have several binding options, including comb, wire, and coil. All of these options create a professional look and allow the pages to lie flat; however, they come at a price. Depending on the quantity you purchase, comb binding can be $3 or more per calendar, and coil binding can be $4 or more.

You might also talk to a customer service representative about ***stapling***, also called ***saddle-stitching***, which is a good option for wallet-size calendars. Stapling involves printing the calendar on three sheets of sturdy paper with two pages on each side. The sheets are then collated, stapled in the middle, and folded to create a booklet. This is considerably cheaper than other binding methods.

Key Points

- With so many templates to choose from, you can save time by selecting the one that is closest in size and layout to the publication you want.
- Although all the templates come with a default color scheme, you can switch to a different scheme at any time. And you can expand the scheme by adding custom colors.
- Printing is a big consideration whenever you need more than just a few copies of a publication. Design with the printing method—and your budget—in mind.
- If you need to send a publication to a large group of people, save time by merging their contact information directly into the publication.
- Subtle backgrounds can unify a publication. In a multi-page publication, the background belongs on the master page.

Chapter at a Glance



Plan longer publications, **page 626**

Create newsletters, **page 628**

Organize content, **page 635**

Edit and proof content, **page 651**

22 Creating Text-Based Publications

In this chapter, you will learn to:

- ✔ Plan longer publications.
- ✔ Create newsletters.
- ✔ Organize content.
- ✔ Edit and proof content.

Most publications contain text, even if it is just a heading or two. However, some types of publications rely mostly on text to convey information, with graphics and other elements playing only a supporting role. Text-based publications that are more than a couple of pages in length, especially those containing multiple stories, pose unique challenges, such as how to flow text logically across multiple pages, how to juggle pages containing different kinds of content, and how to efficiently edit the text and ensure that it is error-free.

In this chapter, you will first review design concepts that pertain to longer publications. Then you will create a multi-page newsletter; size text to fit the available space, and add pages. You will continue stories by linking and unlinking text boxes, insert and remove Continued notices, move and delete pages, and format text in columns. Finally, you will edit a publication in Microsoft Office Word and correct its spelling in Microsoft Office Publisher 2007.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice file in this chapter, you need to install it from the book's companion CD to its default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Planning Longer Publications

Most Publisher design and layout templates are from one to four pages long. However, you can create longer publications, either by inserting pages in a template-based publication or by creating a publication from scratch. You can create an 8-page menu, a 12-page newsletter, a 100-page report, a 1000-page book—the possibilities are limited only by your imagination and by printing practicalities.

When producing a publication that will contain a lot of content, you can save time by planning its design before you start creating it. Many of the decisions you will need to make for printed publications are based on the quantity you need to produce, the quality you want to achieve, and the amount of money you want to invest. For a printed publication, you will need to consider the following:

- **Color.** Will the printed publication be four-color (photographic quality), two-color (usually black plus an accent color), or monochromatic? Color is more expensive, regardless of the production method.
- **Physical size and format.** Approximately how many pages will the publication include? Will the format fit a standard paper size or require trimming? Do you plan to distribute the publication in a stapled, full-page format; in a loose-leaf ring binder; as a folded and stapled booklet; or as a bound document? Some binding methods can support up to a maximum number of pages; if you produce a 1000-page training manual, for example, stapling and tape binding are not viable options.
- **Production method.** How many copies of the publication will you produce? Will you print only one copy of the publication for reproduction, or one copy for each recipient? Will you print the publication on your own printer, at a copy shop, or through a professional printing service?

Other design considerations apply to all types of publications, whether intended for printing or for electronic distribution. For any publication, you will need to consider the following:

- **Basic layout.** Where will you start your publication design? Can you use an existing Publisher template? If you will create similar publications in the future, do you need to design a custom template? For a custom template, will it be easier to start with a Publisher design or layout template and then add and remove elements as necessary? Or should you start from a blank page, insert the specific design elements you need, and then save the publication as a template?

  > **Important** You don't have to create a template for a one-time publication. However, saving the publication as a template makes it available for use in the event that you create a second publication of the same type or of a similar type. It also makes it easier to start over if you encounter a problem with your first attempt.

- **Text design.** Can you use an existing font scheme and color scheme? Or do you need to create custom schemes? The font and font size you select can have a significant impact on the length of your publication.

  See Also For more information about the impact of fonts on publication length, see “Organizing Content,” later in this chapter.

- **Page types.** Will your publication include multiple page types, such as a cover page, a page for contributions from regular columnists or readers, an order form, and so on? If this is a periodic publication, you will want to place repeating features such as a letter from the editor or a contact list in the same location in each issue so that readers know where to find it.
- **Static information.** Will each issue of a periodic publication include static information, such as the title, return address, and logo, in the same places? You can save time by entering that information before saving the publication as a template.

If you do need to create a custom design, page layouts, a font scheme, or a color scheme, do this first so that when you flow content into the publication, it immediately appears in its final format. By laying the groundwork, you can quickly identify and handle content issues as they arise.

> **Tip** To save a publication as a template, click Save As on the File menu, and then in the Save As Type list, click Publisher Template. Publisher saves all the content along with the design, layout, font scheme, and color scheme.

Non-Standard Sizes

Publisher comes with templates for a wide variety of publications. Most are appropriate for use by businesses and community organizations, many are useful for personal or family occasions, and a few are just for fun. Among the latter are the paper-folding templates from which you can create paper airplanes or origami models. (The airplane templates even include optional aerodynamic indicators.)

Most of the templates we work with in this part of the book are designed for printing on standard-sized paper, but Publisher also provides for the non-standard publications you might need to complete your branding portfolio. You can create large items, such as banners and signs, and small items, such as advertisements and gift certificates, using the same resources and techniques you would for any other publication. Although these publications are not primarily text-based, they can present copyfitting challenges that you will be better equipped to meet after reading this chapter.

Creating Newsletters

A ***newsletter*** is a periodic publication containing information of interest to a specific group—for example, employees of a company or members of a club or other organization. Newsletter recipients are frequently subscribers you track in a mailing list, rather than people you don't know. Depending on the size of your subscription base and the amount and frequency of information in each newsletter, you might choose to deliver the content in a traditional printed format or in an electronic format, such as on a Web site or by e-mail.

Publisher 2007 includes over 60 preformatted newsletter designs. When creating a newsletter based on one of these templates, you can choose a one-page spread, appropriate for printing on separate sheets of paper, or a two-page spread, appropriate for a booklet-style publication. If you will distribute the newsletter by mail, you can designate a portion of the back page for mailing information. This area, which is designed to be visible when you fold the publication, includes areas for information about your organization, postage, and recipient details. To enter the recipient details, you can hand-write names and addresses, affix mailing labels, or merge the newsletter with a recipient list to create an individual publication for each recipient.

See Also For information about merging publications with a data source, see "Creating Postcards" in Chapter 21, "Creating Colorful Cards and Calendars."

Copyfitting Text

When you customize the placeholder text in a newsletter that is based on a Publisher template, you will often find that your text does not fit the ready-made text boxes as neatly as the placeholder text did. When this happens, you can change the size of the text box, manually format the text to make it fit, or have Publisher automatically ***copyfit*** the text.

When you insert more text in a text box than can fit, one of the following three things happens:

- If the text box is linked to another text box, the remaining text flows into the next text box.
- If the text box is not linked to another text box and automatic copyfitting is turned off, the Text In Overflow icon appears, and the text size does not change.
- If the text box is not linked to another text box and automatic copyfitting is turned on, the text size decreases until the text fits.

Copyfitting is turned on by default for some text boxes created as part of a Publisher design or layout template, such as those intended for headings. Copyfitting is turned off for general-use text boxes and those that you insert manually. You can turn copyfitting on or off for a selected text box by clicking an AutoFit Text option on the Format menu or by clicking the Text Autofitting option you want on the Text Box tab of the Format Text Box dialog box.

Inserting Pages

Newsletters are generally text-based but frequently contain other types of information. Publisher provides five standard newsletter page layouts: Story, Calendar, Order Form, Response Form, and Sign-Up Form. You can also insert a specified number of blank pages before or after the current page, or you can duplicate an existing page layout a specified number of times. (This option is particularly handy if you create your own page layouts.)

In this exercise, you will create a newsletter with a color scheme appropriate for photocopying. You will replace placeholder text, copyfit the text to the text boxes in which it appears, and add pages to accommodate the intended newsletter content. There is no practice file for this exercise.

BE SURE TO start Publisher and display the Getting Started window before beginning this exercise.

1. In the **Publication Types** list, click **Newsletters**.
2. Scroll the list in the center pane to see the available newsletter templates. Then in the **Classic Designs** category, click **Banded**.
3. In the **Customize** area in the right pane, set the **Color scheme** to **Black & Gray** and the **Font scheme** to **Virtual**.
4. Under **Options**, set the **Page size** to **One-page spread**, and select the **Include customer address** check box. Then click **Create**.

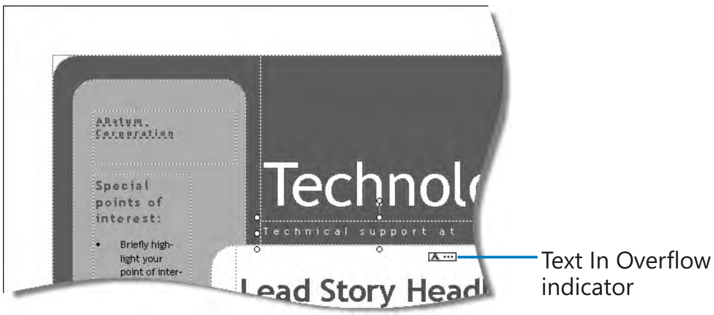
   Publisher creates a four-page newsletter with all design elements, other than placeholder graphics, rendered in shades of black and gray.
5. Close the **Format Publication** task pane, and then set the **Zoom** level to **Page Width**.

   The organization name from the active information set appears in the upper-left corner of this front page. Generic placeholders indicate where to insert the newsletter title and edition-specific information.

6. Click **Newsletter Title**, and type Technology Times. Click **Newsletter Date**, and type April 1, 2008. Then click **Volume 1, Issue 1**, and type Technical support at your fingertips!

Troubleshooting As you type the word *your*, the text disappears. Keep typing, even though you can't see the result.

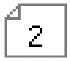
Publisher displays the Text In Overflow indicator to signal that more text is in the selected text box than is shown.



7. On the **Format** menu, point to **AutoFit Text**, and then click **Shrink Text On Overflow**.

   Publisher shrinks the text so that the entire slogan is now visible. However, it is very small.

8. Drag the right handle of the text box to the right until the text box overlaps the text box containing the date. Release the mouse button when the right edge of the selected text box is slightly to the left of the word *April*. Then click away from the box to see the results.



Page 2

9. On the page sorter, click the **Page 2** button to display page 2. Then scroll the page to view the placeholder content.

   Placeholder stories within each set of linked text boxes provide useful information about newsletter design and content. The newsletter title you entered in step 6 appears in a text box at the bottom of the page.

10. Display page 3, and scroll to the top of the page.

   The slogan you entered in step 6 is only partially visible in the text box in the upper-left corner of the page, because the text box is not wide enough to accommodate it.

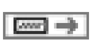
11. Click the text box that contains the slogan, and drag the right handle to the right so that the text box fills the available space to the left of the text box containing the page number. Then on the **Format** menu, point to **AutoFit Text**, and click **Best Fit**.

   The font size of the slogan text increases to fit the wider text box.

   At the beginning of each story is the approximate number of words that fits in the set of linked text boxes. This estimate is based on the default font scheme for this template, which you changed before creating the publication.

12. Click anywhere in the first story on page 3.

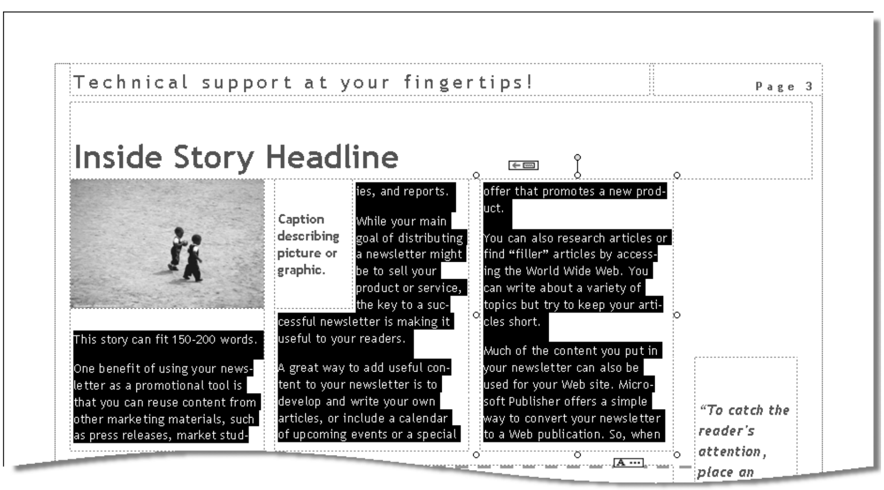
   Publisher selects the first text box in the story and displays the Go To Next Text Box button.



Go to Next Text Box

13. Click the **Go to Next Text Box** button.

   Publisher selects the last text box in the story and displays the Go To Previous Text Box button and the Text In Overflow indicator. At the current font size, the placeholder text for this story does not fit in the space provided.



This newsletter will contain several lengthy stories, so you need to add pages to accommodate them.

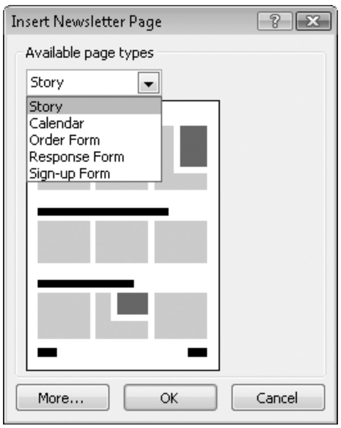
14. On the **Insert** menu, click **Duplicate Page**.

    Publisher inserts a new page 4 with the same layout as page 3.

15. On the **Insert** menu, click **Page**.

    The Insert Newsletter Page dialog box opens.

16. Click the **Available page types** arrow to display the types of pages you can insert.

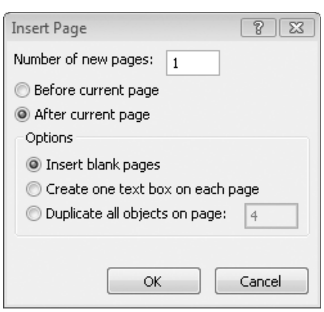


17. Click each type in turn to display a preview of the page layout.

    Each page type includes at least one story area, giving you many options.

18. In the **Available page types** list, click **Story**. Then click **More**.

    The Insert Page dialog box opens.



From this dialog box, you can insert multiple pages containing no design elements, one text box, or the same layout as the currently selected page.

19. In the **Number of new pages** box, enter 3, and in the **Options** area, click **Duplicate all objects on page**. Then click **OK**.

    Publisher inserts three more identical pages.

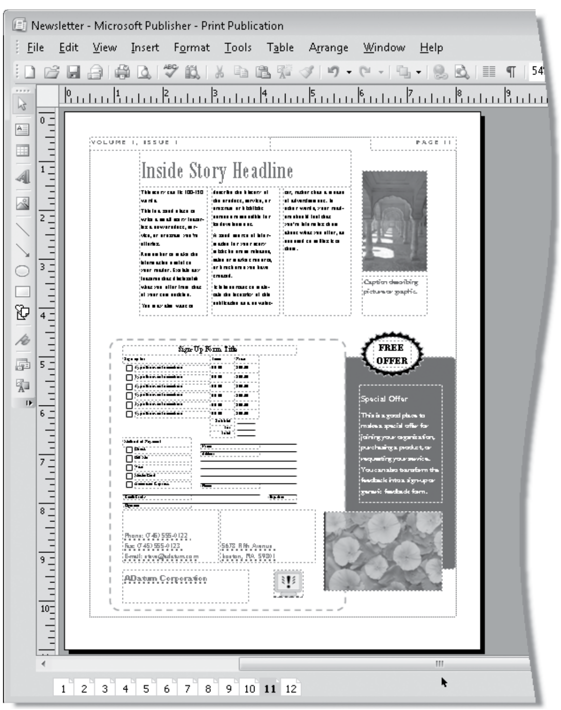
20. Display page 7. On the **Insert** menu, click **Page**. In the **Insert Newsletter Page** dialog box, click **Calendar** in the **Available page types** list, and then click **OK**.

    Publisher inserts a page containing a calendar with a schedule of events, space for one story, and one graphic with a caption. The Zoom level changes to display the whole page.

> **Troubleshooting** The new calendar page uses a different font scheme than the one you selected when you created the newsletter. In fact, the font scheme for the entire publication has reverted back to the default for the template on which it is based to maintain consistency with the newly inserted page. Refer to step 22 for more information.

21. Repeat step 20 to insert an **Order Form**, a **Response Form**, and a **Sign-up Form**.

    The resulting publication includes 12 pages.



22. Display the **Font Schemes** section of the **Format Publication** task pane.

    The Virtual font scheme appears to be selected, but in fact the publication has reverted to the default font scheme for the Banded newsletter template, which is at the top of the list.

23. In the font scheme list, click **Virtual** to reapply the font scheme to the publication.

24. Display page 12 to view the customer information section and other outside page content.

CLOSE the publication without saving your changes.

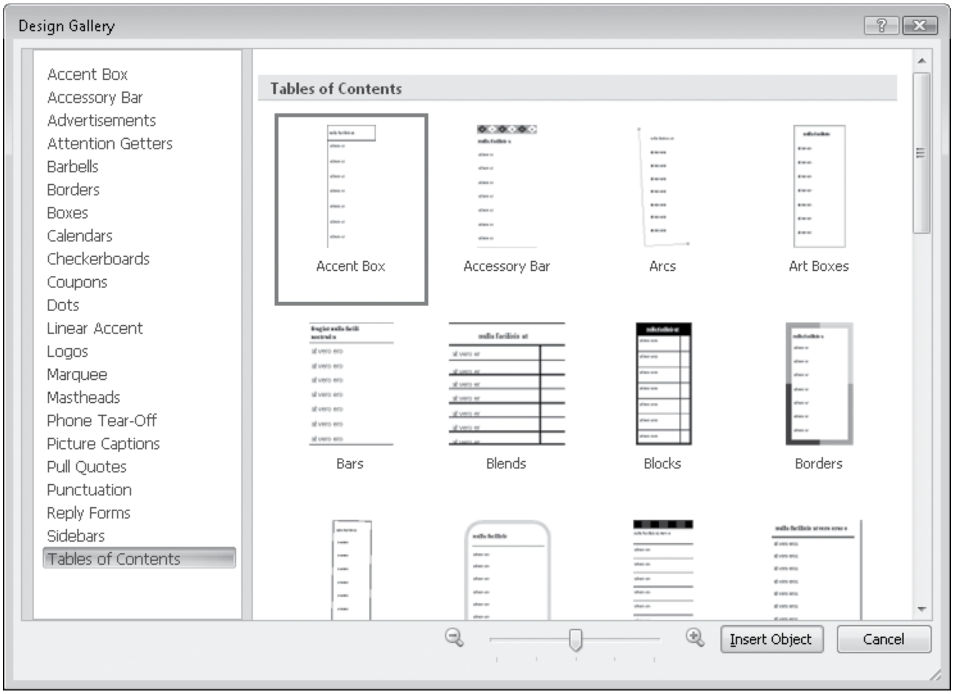
Organizing Content

Longer publications often include several independent stories that compete for the reader's attention. Before entering content into a newsletter or other long publication, it is wise to decide where to place each piece of content within the overall context of the publication. For example, in a newsletter, important stories should start on the first page but can continue inside the publication, most likely near the end. Some people think that stories that start on the right page of a two-page spread are more likely to be read than stories that start on the left page. In a publication that will be folded for mailing, place information that you definitely want the recipient to see on the first or last (outside) page.

Working with a Table of Contents

A longer publication can often benefit from a navigational aid such as a table of contents. When you create a publication such as a newsletter, Publisher inserts a table of contents object on the first page of the publication. You must then manually customize the object to reflect the publication's contents.

You can insert a table of contents object anywhere in a publication from the Design Gallery. You can choose from 34 designs, each color-coordinated with the current publication font scheme. If you know the name of the design or layout template the publication is based on, you might find a coordinating table of contents object.



Troubleshooting After inserting a table of contents object, you can't change its design. However, changes you make to the publication font scheme or color scheme are applied to the table of contents object.

Each table of contents object includes graphic elements and a table containing placeholders for a header, article names, and page numbers. You must manually replace the text with your own. If you move information or add pages, Publisher will not automatically update the page number in the table of contents, so it's a good idea to insert the information in the table of contents after you finalize the page layout.

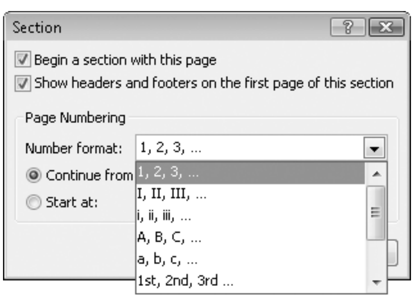
To change the layout of a table of contents object—for example, to add or remove rows—right-click the table part of the object, click Format Table, and then format it as you would any other table.

Creating Sections

If the topics in a long publication fall logically into groups—for example, parts, subjects, or time periods—you can formally title these groups by assigning them to ***sections***. You can then include only the sections—preceded by any ***front matter*** (such as an introduction) and followed by any ***back matter*** (such as a list of resources or a bibliography)—in the primary table of contents at the beginning of the publication, and include a list of topics in a secondary table of contents at the beginning of each section.

> **Tip** You can insert another type of section break within a paragraph to cause its text to continue in the next linked text box. To insert a paragraph section break, press Ctrl+Enter.

To create a section, select the page that you want to designate as its beginning. (If your publication has two-page spreads, begin each section on a right page—called a ***recto*** page in the publishing world; the left page is called a ***verso*** page—so that the section title falls on the front side of the leaf and faces the reader.) Then click Section on the Insert menu. In the Section dialog box, select the Begin A Section With This Page check box, and then indicate whether you want the page to display headers and footers, and whether to restart the page numbering or continue from the previous section. You can choose from a variety of page-numbering formats and designate the beginning page number.



> **Tip** You cannot automatically include the section number as part of the page-numbering format. However, you can work around this limitation by manually inserting the section number in the text box containing the page number.

In some types of publications, such as reports, you might want to draw attention to the starting point of each section by designing a special page called a ***section opener***. If the last page of the previous section ends on a recto, you can insert a blank verso page to force the section opener onto a recto. If you use openers, you will want to clear the

Show Headers And Footers On the First Page Of This Section check box before clicking OK to close the Section dialog box. (You will need to manually remove the header and footer from a preceding blank page.)

> **Tip** On the page sorter, a space appears between sections.

Moving Content

In many types of publications, each story appears on one page, whether as a full page of text, multiple columns within a text box, or multiple text boxes organized to fit the space. In some types of publications, however, you might need to ***continue a story*** elsewhere in the publication by flowing information that doesn't fit in one text box into another.

For example, in a newspaper the first few paragraphs of the most important story usually appear on the front page of the main section, while the first few paragraphs of a less important story might begin on the next spread. The remainder of each article appears further back. In a magazine, the first few pages of a long article might appear in one place and the final pages might be relegated to the back of the magazine. In Publisher layout terms, the stories would flow through one or more text boxes on one page to text boxes on later pages.

During the review process of a publication containing lengthy stories, you might find that due to changes, additions, or deletions, you need to change the flow of a story. You can move the text boxes and pages containing content in the following ways:

- To move a text box elsewhere on the same page, point to its outer border, and then when the pointer changes to a four-headed arrow, drag it to its new location.
- To move a text box to a location on another page, do one of these two things:
  - Drag the text box into the scratch area, display the destination page, and then drag the text box to the desired location.
  - Cut the text box to the Clipboard, display the destination page, paste the text box (it appears either on the page or in the scratch area) and then drag it to the desired location.
- To move a page to another location, drag the page icon in the page sorter. As you drag, a black arrow indicates the insertion location. Release the mouse button when the page is where you want it.

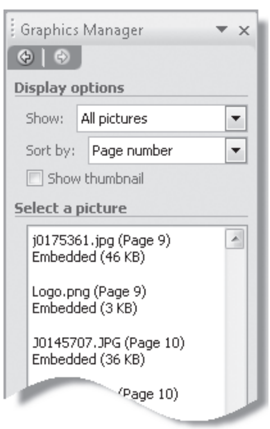
Troubleshooting When you move a text box, its content moves with it, and it retains any links to other text boxes. Moving a linked text box or a page containing linked text boxes could result in segments of a story appearing out of order.

Graphics Manager

In a multi-page publication that includes graphics, you can quickly view, locate, or replace graphics by using the Graphics Manager task pane. This task pane displays the file name and page number of all embedded or linked graphics in the publication, plus either the file size or a thumbnail of each graphic.

You can sort the graphics list by file name, file extension, file size, page number, and status (embedded or linked). If you work with linked graphics, the Graphics Manager task pane identifies any missing or modified images that need your attention.

To display the Graphics Manager task pane, click Graphics Manager on the Tools menu or in the task pane header list.



When you point to a graphic in the Select A Picture list, a ScreenTip displays the file name, file extension, file size, page number, and status of the graphic, and an arrow appears. Clicking the arrow displays a menu from which you can move to and select the image, convert an embedded image to a linked image or vice versa, replace the image, or display additional image properties including scaling, resolution, and color model.

Solving Organization Problems

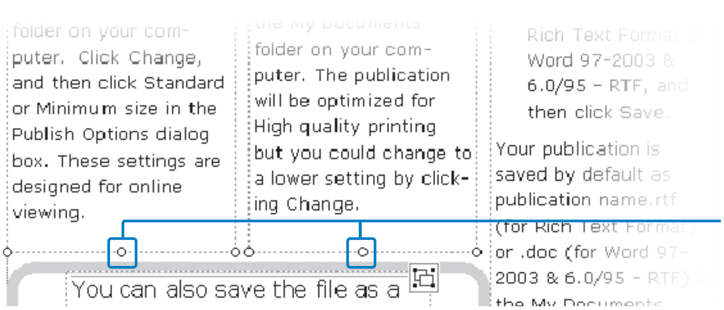
When you flow a story into one or more text boxes, the story might be too long or too short to conform to the allocated space. To address this type of problem, you can take one or more of the following actions:

- **Add or remove text.** If you have editorial control over the content, you can add or remove a word, sentence, or paragraph to fit the available space. Removing text is not necessarily a bad thing; just remember Mark Twain's famous quote, "If I had more time, I'd have written a shorter book."
- **Add, remove, or resize graphics.** A picture might not be worth 1000 words, but it can easily be made to occupy the space of 20, 50, or 100 words.
- **Add, remove, or link to text boxes.** Continue a long story into an additional text box on the same page or on another page. If a story does not require all the linked text boxes associated with it, you must manually break the forward links from the last occupied text box to the subsequent linked text boxes in the set.

> **Tip** To cleanly disconnect multiple unused linked text boxes, move to the final linked text box in the set by pressing the Go To Next Text Box button at the bottom of each text box. From the final text box, press the Go To Previous Text Box button. Then on the Connect Text Boxes toolbar, click the Break Forward Link button. Continue this process until the last occupied text box is the final box in the set.

- **Resize text boxes.** This isn't quite as simple a solution as it might sound. To make one text box taller, shorter, wider, or narrower, you will probably have to resize others, either to make space, fill space, or balance the design.

  To change the height of a set of identically sized text boxes simultaneously, select the first text box, press and hold the Shift key, and select the other text boxes. (The Group button will appear.) Then drag the top or bottom handle of any one of the selected text boxes to resize them all.



Drag the bottom handle of either text box to change the height of both.

- **Change the layout of text within the text box or within the story.** You can change the amount of white space that appears around the text in a text box (increasing the margin decreases the text area), change the number of columns within a text box, or change the number of text boxes that contain the story. For example, changing from three narrow columns of justified paragraphs to two wider columns can be enough to shorten the content by a line or two.

> **Tip** You can change the margins of one text box from the Text Box tab of the Format Text Box dialog box. To automatically apply the modified text box settings to all new text boxes added to the publication, select the Apply Settings To New Text Boxes check box on the Colors And Lines tab.

- **Change the font or font size of the story.** If your design uses multiple fonts or sizes, you can apply one of the other available fonts or sizes to the story in a text box. However, changing to a font or size that is not used anywhere else in the publication can be distracting and look amateurish.

> **Tip** You might be tempted to change the margins of a publication to try to change its ***footprint***. You can relocate the blue margin guides by clicking Layout Guides on the Arrange menu and entering new top, bottom, left, and right margins on the Margin Guides tab. However, the layout of your publication does not change to reflect the new margin settings, so this adjustment essentially has no effect on the footprint.

In shorter publications such as flyers and tri-fold brochures, it is reasonably simple to rearrange text boxes and resize content to appropriately fill the available space. Longer publications present additional challenges: You might need to conform to a 16-page ***signature*** for an offset-printed publication, to a 4-page footprint for each ***leaf*** added to a folded publication, or to a 2-page footprint for each leaf of a loose leaf, double-sided publication. After you insert all the content you intend to use in a publication and adjust the size of each story's text boxes to fit its content, you might find that the publication is too long or too short to fit the intended footprint. You might be able to fix the problem by adding, removing, or changing individual stories, but if that is not possible, you can also solve the problem by making global changes to the publication.

One way to manage the length of your publication is through your choice of font scheme. Different fonts have different height-to-width relationships—for example, the letter *m* is narrower in 12-point Calibri than it is in 12-point Verdana. The difference may be slight on a letter-by-letter basis, but it can be significant when applied to an entire publication.

The quick brown fox jumps over the lazy dog.

The quick brown fox jumps over the lazy dog.

The quick brown fox jumps over the lazy dog.

The quick brown fox jumps over the lazy dog.

The quick brown fox jumps over the lazy dog.

The quick brown fox jumps over the lazy dog.

The quick brown fox jumps over the lazy dog.

The Font Schemes list, both in the Getting Started window and in the Format Publication task pane, displays three pieces of information for each font scheme: the scheme name, the primary font, and the secondary font. The primary font is used for headings and titles, and the secondary font for body text. The names of the primary and secondary fonts are displayed in those fonts, providing a means by which you can gauge the effect each scheme will have on the length of your publication.

> **Tip** You cannot make changes to the font schemes that come with Publisher, but you can create a custom font scheme, either from scratch or based on an existing scheme. You can change, rename, and delete custom font schemes.

In this exercise, you will trace the continuation of a story; move, insert, and delete pages; insert and remove Continued notices; format text in columns; and connect and disconnect text boxes.

USE the *ADatumNews* publication. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\PublisherPublications* folder.

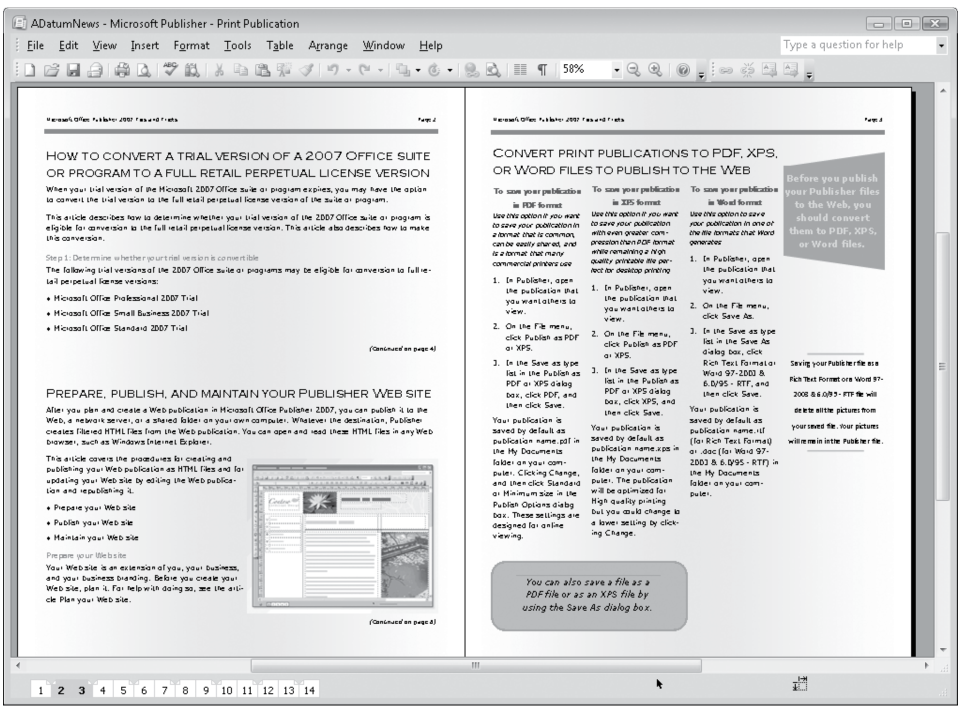
OPEN the *ADatumNews* publication, and close the Format Publication task pane.

1. If you have a printer available, print the publication (double-sided, if possible) to make it easier to follow along with the exercise.

2 Page 2

2. On the **View** menu, select **Two-Page Spread** if it is not already selected. Then on the page sorter, click the **Page 2** button to display pages 2 and 3.

   The publication contains five stories: Two start on page 1 and continue later in the publication, two start on page 2 and continue later in the publication, and one complete story appears on page 3.



3. On the page sorter, do the following:

4 Page 4

   - Click the **Page 4** button to display pages 4 and 5.

     The first story beginning on page 2 continues on page 4 and ends halfway through page 5; the other half of the two-column text box on page 5 is empty.

> **Tip** You can follow the stories by clicking the Go To Previous Text Box and Go To Next Text Box buttons.

- Display pages 6 and 7, then 8 and 9, and then 10 and 11.

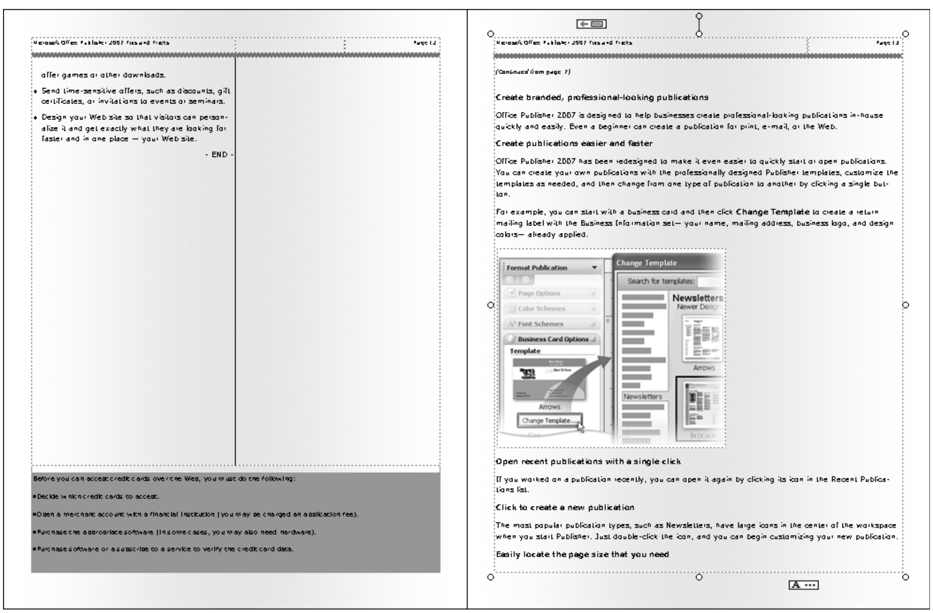
  The second story beginning on page 2 continues on page 6 and runs through to page 10, ending partway down the left text box.

  The second story beginning on page 1 continues in the right text box on page 10, runs through page 11, and ends near the top of the left text box on page 12.

- Display pages 12 and 13, and then click anywhere in the large text box on page 13.

  On page 12, most of the left text box is empty, and the right text box is entirely empty. A sidebar relating to the story that ends at the top of the page spans the bottom of the page.

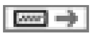
  The first story beginning on page 1 continues on page 13. The Text In Overflow icon at the bottom of the page indicates that the story includes additional content that can't be shown in the allocated space.



- Display page 14.

  The last page of the publication is self-contained and complete.

You need to reorganize the publication so that the stories continue in the order in which they begin.



Go to Next Text Box

4. Return to page 1. Click in the text box containing the story titled *What's New in Publisher 2007?*, and then click the **Go to Next Text Box** button that appears below the text box.

   Publisher moves to page 13. The story does not connect to additional text boxes, so you need to move only this page to follow page 3.

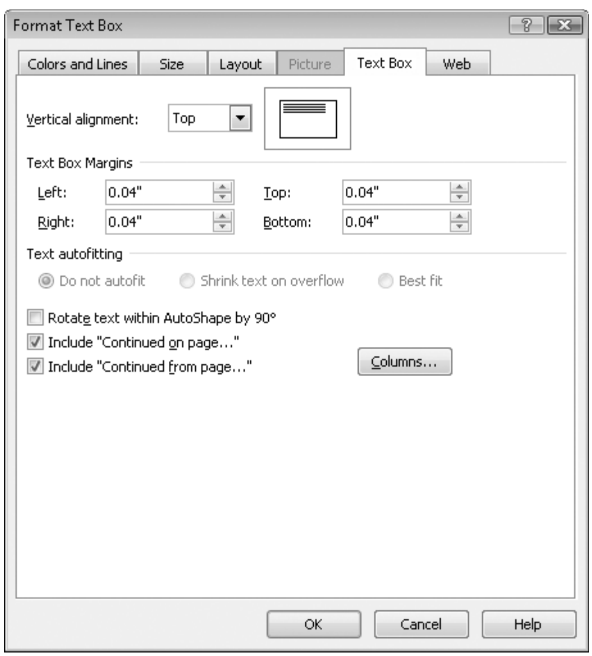
5. On the **View** menu, click **Two-Page Spread** to turn off that view.

> **Tip** In Two-Page Spread view, moving either page of a spread on the page sorter moves both pages.

6. On the page sorter, drag page 13 after page 3, so that it becomes page 4.

   You need to accommodate the part of the story that is not visible.

7. Click in the text box. On the **Format** menu, click **Text Box**, and then in the **Format Text Box** dialog box, display the **Text Box** tab.



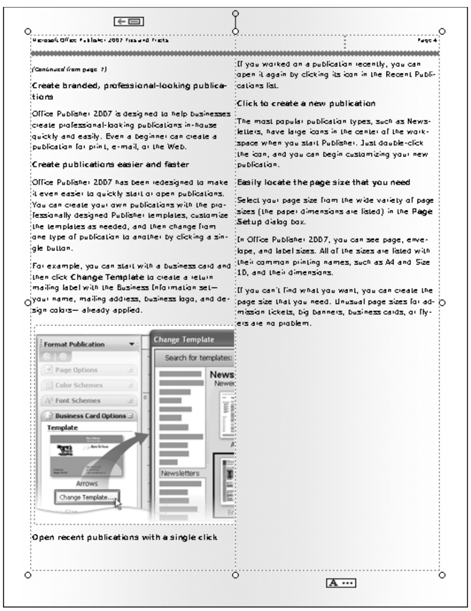
> **Tip** The two Include "Continued" check boxes govern whether previous and next page numbers appear at the beginning and/or end of the selected text box. By default, you must manually select these check boxes for each text box in which you want the *Continued* text to appear. If you want one or both of these elements to appear by default, you can set your preferences here and then, on the Colors And Lines tab, select the Apply Settings To New Text Boxes check box.

8. Clear the **Include "Continued on page..."** check box. Then click **Columns**.

   The Columns dialog box opens.

9. Change **Number** to 2, click **OK**, and then click **OK** in the **Format Text Box** dialog box.

   The text box contents flow into two columns, leaving considerable empty space at the bottom of the right column. However, the Text In Overflow icon indicates that additional text exists.



10. In the left column, click the picture. Then drag its lower-right handle up and to the left until the right edge of the picture aligns with the right edge of the column.

    When you release the handle, additional text and a graphic appear in the right column.

11. Repeat step 10 to resize the graphic in the right column to fit the column. Then click in the text box.

    The Text In Overflow icon still appears.

12. On the **Insert** menu, click **Duplicate Page** to insert a new page 5 containing an empty two-column text box.

Create Text Box Link

13. Display page 4, click in the text box, and then on the **Connect Text Boxes** toolbar, click the **Create Text Box Link** button.

    When you move the pointer back over the publication window, it changes to a pitcher.

14. Display page 5, and click in the text box.

    Additional content fills page 5. The Text In Overflow Icon still appears.

15. Right-click the text box, click **Format Text Box**, and then click the **Text Box** tab. Clear the **Include "Continued from page…"** check box, and then click **OK**.

    It is unnecessary to include continuation messages when a story appears on consecutive pages.

16. On the **Insert** menu, click **Page**, and in the **Insert Newsletter Pages** dialog box, click **More**.

    The Insert Page dialog box opens.

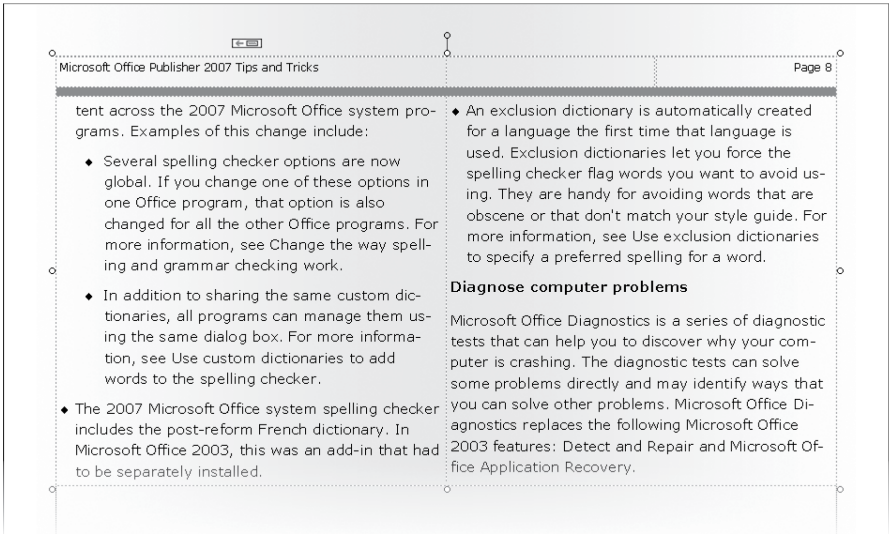
17. Set the **Number of new pages** to 3, click the **Duplicate all objects on page** option, and then click **OK**.

    Publisher inserts four new pages (6, 7, and 8) containing empty two-column text boxes. The publication now has 18 pages.

18. Display page 5, and click in the text box. Click the **Create Text Box Link** button, display page 6, and click in the text box to continue the story. Repeat the process two times to continue the story through to page 8. Then resize each graphic to the width of its column.

    The story ends partway down the left column on page 8.

19. Click the text box, and then drag the bottom handle up to halfway through the content, releasing the mouse button when the content fills the two-column text box.



Microsoft Office Publisher 2007 Tips and Tricks   Page 8

tent across the 2007 Microsoft Office system programs. Examples of this change include:

- Several spelling checker options are now global. If you change one of these options in one Office program, that option is also changed for all the other Office programs. For more information, see Change the way spelling and grammar checking work.
- In addition to sharing the same custom dictionaries, all programs can manage them using the same dialog box. For more information, see Use custom dictionaries to add words to the spelling checker.

- The 2007 Microsoft Office system spelling checker includes the post-reform French dictionary. In Microsoft Office 2003, this was an add-in that had to be separately installed.
- An exclusion dictionary is automatically created for a language the first time that language is used. Exclusion dictionaries let you force the spelling checker flag words you want to avoid using. They are handy for avoiding words that are obscene or that don't match your style guide. For more information, see Use exclusion dictionaries to specify a preferred spelling for a word.

Diagnose computer problems

Microsoft Office Diagnostics is a series of diagnostic tests that can help you to discover why your computer is crashing. The diagnostic tests can solve some problems directly and may identify ways that you can solve other problems. Microsoft Office Diagnostics replaces the following Microsoft Office 2003 features: Detect and Repair and Microsoft Office Application Recovery.

Troubleshooting Be sure to size the window as shown in this graphic, or later steps might not work as expected.

20. Insert a copy of the text box at the bottom of the page, and size it to completely fill the available space. Using the skills you have learned, format the text box to include the "Continued from page" message when it contains text.

    You will continue the second story from page 1 in this text box.

21. Display page 1, click in the text box containing the story titled *Plan Your Web Site*, and then click the **Go to Next Text Box** button that appears.

    Publisher moves to the second column on page 15.

Break Forward Link

22. Return to the previous text box, and on the **Connect Text Boxes** toolbar, click the **Break Forward Link** button.

    The Text In Overflow icon appears. On pages 15 through 17, the text boxes that previously held the continued story are now empty.

23. Move page 16, which now contains an empty two-column text box, to become page 9. Then use the skills you have learned to continue the second story that begins on page 1 (*Plan Your Web Site*) in the lower text box on page 8 and then in the text box on page 9.

24. Click the **Go to Next Text Box** button at the bottom of page 9.

    Publisher moves to page 17, where the only content in the text box is the indicator of the end of the story (- END -).

Troubleshooting If your page 17 contains additional content, the likelihood is that you didn't size the text boxes as we did on page 8 (see steps 19 and 20). You can correct this by returning to page 8 to decrease the height of the upper text box and increase the height of the lower text box.

25. Delete the end tag from the text box, and press the Backspace key to return the insertion point to the end of page 9. Then click the **Break Forward Link** button to end the continuation of the story.

    The remaining two story continuations are in the correct order.

26. Use the skills you have learned to do the following:

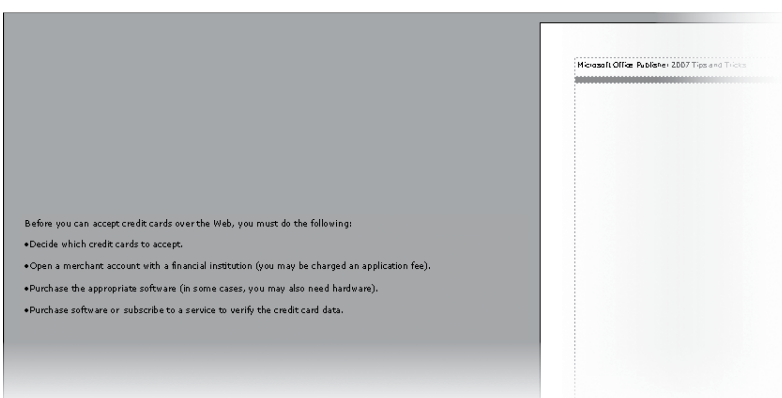
    - End the first story from page 2 (*HOW TO CONVERT A TRIAL VERSION…*) in an evenly filled two-column text box on page 11.
    - Continue the second story from page 2 (*PREPARE, PUBLISH, AND MAINTAIN…*) into a two-column text box at the bottom of page 11, through pages 12, 13, and 14, to end on page 15.

Tip The text boxes on pages 12–15 are already linked, so you need only link the text boxes on pages 2, 11, and 12.

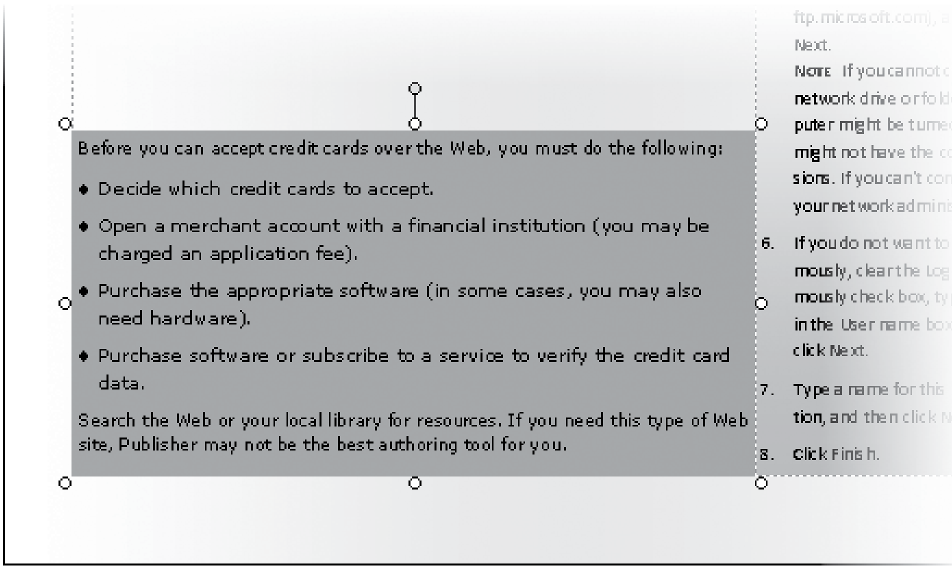
27. On the page sorter, right-click the **Page 16** button, click **Delete Page**, and then in the **Microsoft Office Publisher** message box, click **Yes** to confirm the deletion of the page, including the empty text box.

    Page 16 now contains an empty two-column text box and a sidebar.

28. Drag the sidebar into the gray scratch area to the side of the page.



29. Delete page 16, and then display page 15. Drag the sidebar from the scratch area to the empty space in the lower-left part of the page, and then size it to fit the column width and display its contents.



30. Display the publication in **Two-Page Spread** view, and change the **Zoom** level to **Whole Page**. Review the 16-page publication to see the results of your work.

> **Tip** Because this publication is double-sided, you must end with an even number of pages.

31. When you finish, update the page numbers in the table of contents on page 1 of the publication to reflect the final result.

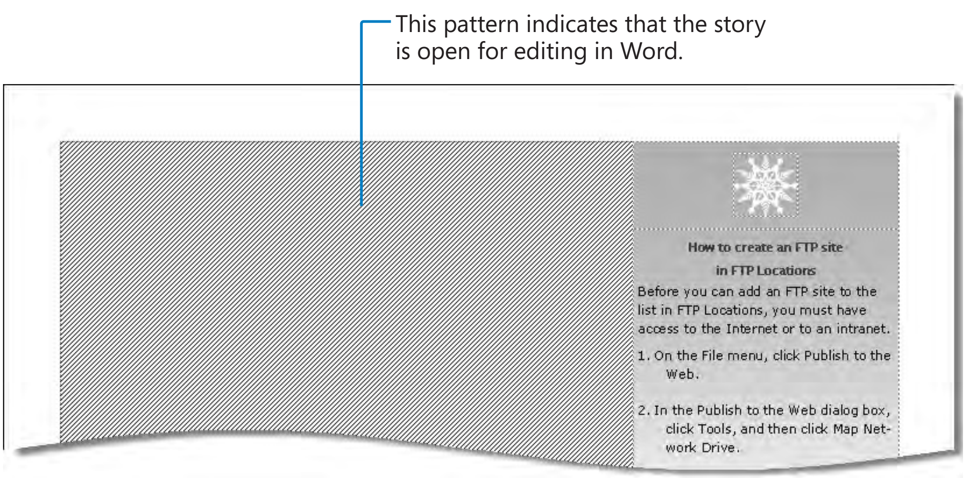
CLOSE the publication without saving your changes.

Editing and Proofing Content

For convenience, we have gathered together information about techniques for ensuring the accuracy of your text in the last topic of this chapter. However, editing and proofing are processes that are ongoing throughout the development of a publication. The language you choose to convey your message should be polished, targeted to your audience, and error-free.

Editing Content in Word

If you are familiar with Microsoft Office Word, you might be more comfortable crafting text by using Word tools and techniques than within a publication. Provided you have Word installed on your computer, you can simply right-click any text in a publication, point to Change Text, and then click Edit Story In Microsoft Word. A Word document containing the formatted text of the story opens, and Publisher indicates with cross-hatching that the text box(es) containing the story are unavailable for editing.



You can make content and formatting changes within the Word document. All the usual Word functions, including spelling and grammar review and word count, are available. When you finish, you close the document to return to Publisher. There is no need to save the document. (In fact, you cannot actually save the document, only a copy of it.) Your changes are immediately visible in the publication.

Tip You can insert comments and track changes in the document within the current Word session. However, when you close the document, all changes are accepted and comments removed before the content reappears in Publisher.

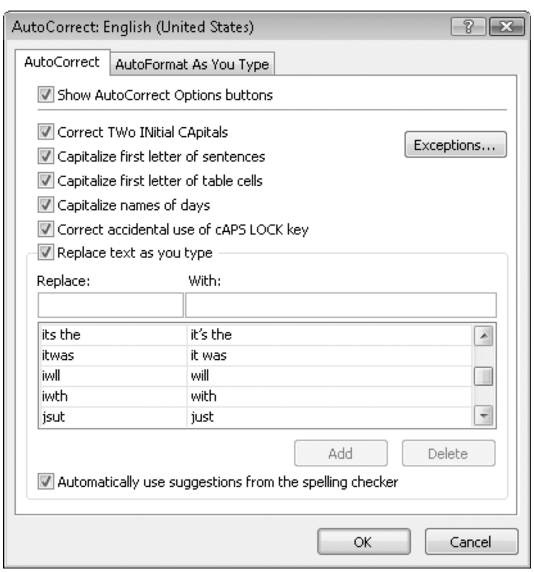
Correcting Spelling Errors

Before you publish a document, it is important to confirm that it contains no spelling errors. In this electronic age, there are few excuses for the spelling errors that frequently occur in professionally printed materials. (This seems to be a particularly prevalent issue with restaurant menus!) Even in a short publication—but much more so in a long publication—err on the safe side, and use the tools that the 2007 Microsoft Office system places at your disposal.

Publisher provides two tools to help you with the chore of eliminating spelling errors: the AutoCorrect and Spelling features. It doesn't include the grammar-checking feature available in Microsoft Office Word and Microsoft Office Outlook. However, if you display a story in Word as discussed earlier in this topic, you can run the full Spelling And Grammar feature. This is another great benefit of the easy interaction between Publisher and Word.

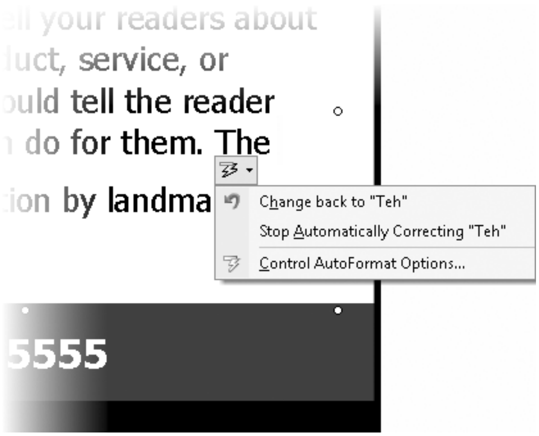
Have you noticed that Publisher automatically corrects some misspellings (such as *teh* to *the*) when you type them? This is the work of the AutoCorrect feature. AutoCorrect fixes common spelling and typing errors so that you don't have to. AutoCorrect comes with a long list of frequently mistyped words and their correct spellings.

> **Tip** To open the AutoCorrect dialog box, click AutoCorrect Options on the Tools menu.



If you frequently mistype a word that AutoCorrect doesn't change, such as a difficult last name, you can add it to the list in the AutoCorrect dialog box.

If you deliberately mistype a word and don't want to accept the AutoCorrect change, you can undo the change by clicking the Undo button on the Standard toolbar or by pointing to the corrected word, clicking the AutoCorrect Options button that appears, and then clicking Change Back.



A great time-saving trick for longer publications is to use the AutoCorrect feature to avoid having to manually enter phrases that occur frequently in your publications. For example, if you work on a project in which you often have to type *For more information, see* followed by a topic or chapter reference, you can enter a short combination of letters that does not form a word, such as *fmi*, and add the full phrase to the list in the AutoCorrect dialog box. Thereafter, when you type *fmi* and press the Spacebar, AutoCorrect replaces the letter combination with the full phrase.

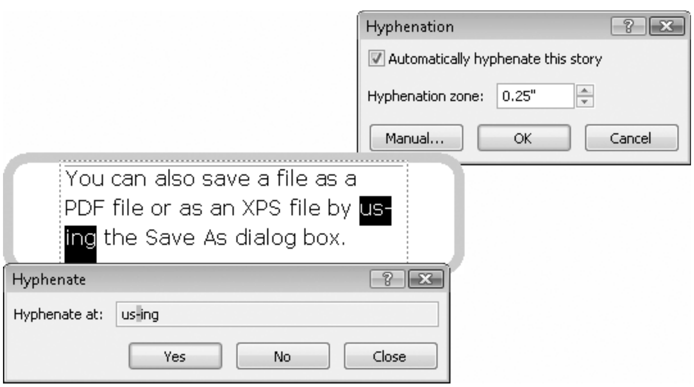
Although AutoCorrect ensures that your documents are free of common misspellings, it cannot detect random typographical errors. To help you detect this type of error, Publisher includes the same spell-checking feature found in other Office programs. By default, Publisher checks your spelling as you type and indicates suspected spelling errors with red wavy underlines. You can correct an individual error by right-clicking it and selecting a suggested alternative, or you can check the spelling of one story or the entire publication by clicking Spelling on the Tools menu and correcting errors in the Check Spelling dialog box.

Over-reliance on spelling checkers has led to a modern-day misspelling epidemic. People seem to believe that just because a publication has passed a spell-check, it must be OK, but there are numerous common mistakes in word usage, for example using “their” instead of “there,” that will pass a spell-check. In critical publications, take the time to use the Word grammar checker, which will catch many of these. The grammar checker indicates questionable usage with a green wavy underline.

Controlling Hyphenation

Many Publisher templates use text boxes to emulate the kinds of skinny-column layouts used in newspapers and magazines. To avoid leaving ugly gaps at the ends of lines and to make more content fit in less vertical space, Publisher automatically hyphenates multi-syllable words that fall within 0.25 inches of the edge of the text box.

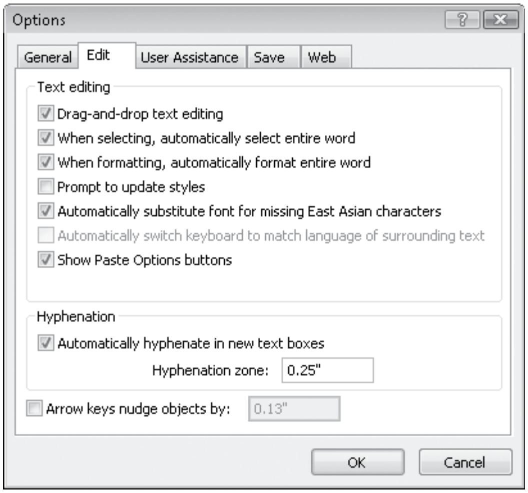
For each story, you can change the width of the default hyphenation zone, or you can turn off this feature entirely by right-clicking the story you want to change, pointing to Proofing Tools, and then clicking Hyphenation to display the Hyphenation dialog box.



Clicking Manual displays a dialog box that moves from one hyphenated word to the next, allowing you to specify which words you want to hyphenate and how you want to hyphenate them.

Tip If you are going to manually hyphenate a story, ensure that all editing, including spell-checking, is complete before you begin. It is a waste of time to fine-tune hyphenation if later changes might rewrap lines and necessitate another round of adjustments.

To check the hyphenation settings of a story, you can click Options on the Tools menu, and then in the Options dialog box, click the Edit tab.



Changing the settings in the Hyphenation area on this tab affects only new text boxes, not existing ones.

In this exercise, you will create an advertisement, edit its content in Word, and check the spelling of the advertisement text. There is no practice file for this exercise.

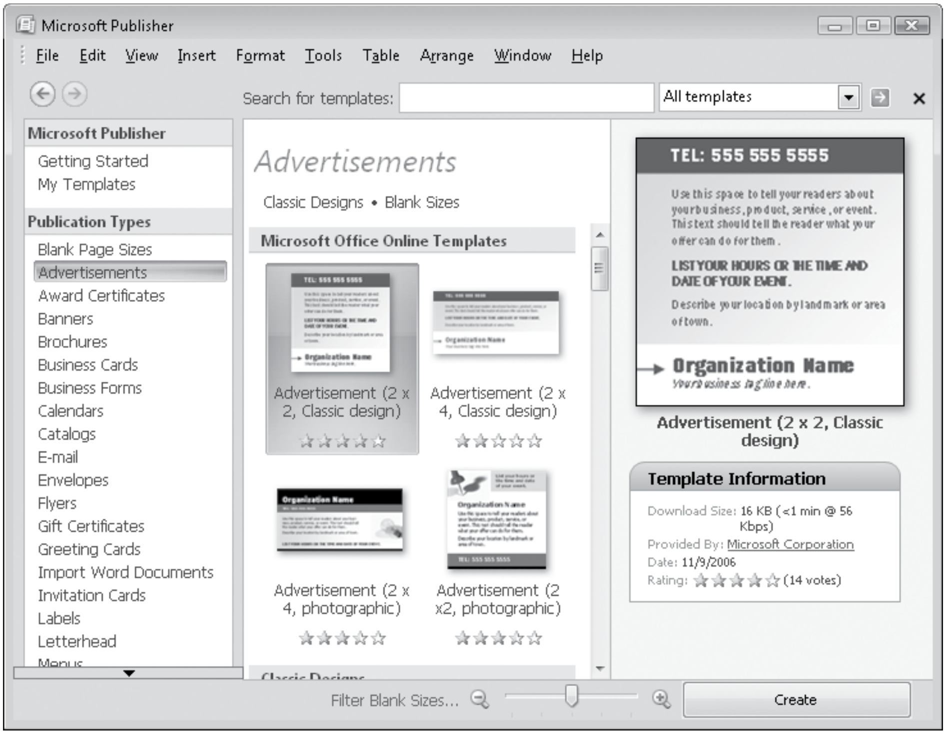
BE SURE TO close any open publications before beginning this exercise.

1. In the **Publication Types** list, click **Advertisements**.

   Publisher offers six monochromatic designs, each available in square and rectangular versions. If the active information set includes a logo, the design previews display the logo as well as the company name.

2. In the **Microsoft Office Online Templates** area, click **View templates from Microsoft Office Online**.

If you have an active Internet connection, additional color advertisement templates provided by Microsoft (and possibly others) appear. Each Internet template is of a fixed size, and has a rating based on feedback from Office Online visitors.



> **Troubleshooting** If you don't have an active Internet connection, complete the exercise with any Publisher advertisement template.

3. Select a template you like, and then click **Create**.

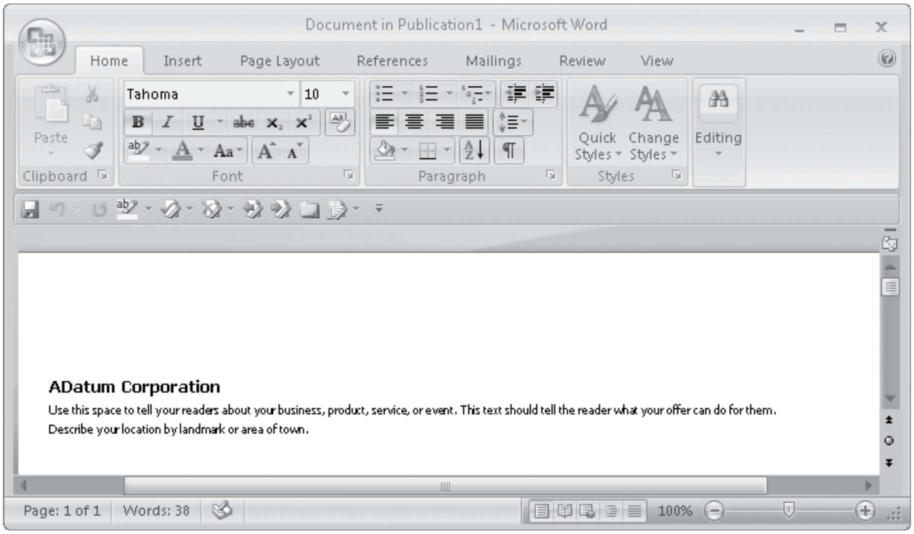
   Publisher creates the selected advertisement. Placeholder text suggests the type of information you might include in each area of the advertisement. Blue dashes indicate placeholders linked to the information set.

4. Right-click the main placeholder text, point to **Change Text**, and then click **Edit Story in Microsoft Word**.

> **Troubleshooting** If Word is not installed on your computer, skip to step 5, and then follow along with the rest of this exercise in Publisher.

The text box becomes unavailable in Publisher, and Word opens, displaying the placeholder text.

See Also For information about working in Word 2007, refer to *Microsoft Office Word 2007 Step by Step*, by Joyce Cox and Joan Preppernau (Microsoft Press, 2007).



Your Word window might look different than the one shown here, depending on your settings.

5. In the text displayed in the document, remove a space from between two words to create a spelling error.

   Word immediately indicates the error with a red wavy underline.

6. Close the document to return to Publisher. After a short pause, the changed text appears in the advertisement.

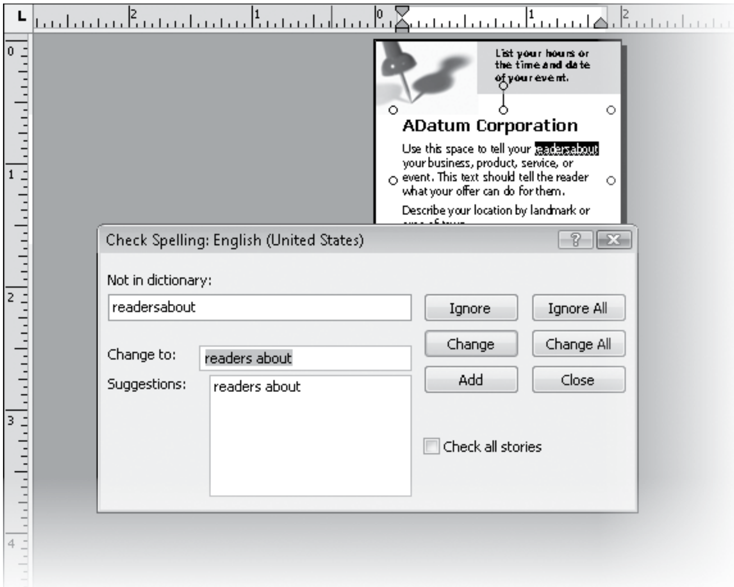
   Publisher also indicates the misspelling with a red wavy underline.

> **Troubleshooting** If you don't see the wavy underline, point to Spelling on the Tools menu, and then click Spelling Options. Under When Correcting Spelling In Publisher, select the Check Spelling As You Type check box, and then click OK.

7. On the **Tools** menu, point to **Spelling**, and then click **Spelling**.

   The Check Spelling dialog box opens, prompting you to correct the error. Your publication is visible behind the dialog box so that you can easily locate the indicated error in context—not important in a small publication such as this one, but very helpful in a longer publication.

   You can accept the suggested correction or enter any replacement text you want in the Change To box. Then click Change to effect the replacement and move to the next detected error in the story (if there is one). After checking the story, Publisher offers to check the remainder of the publication.



8. Finish checking the spelling of the publication content, and then in the **Microsoft Office Publisher** dialog box that appears when the spelling check is complete, click **OK**.

CLOSE the open publication without saving your changes, and exit Publisher.

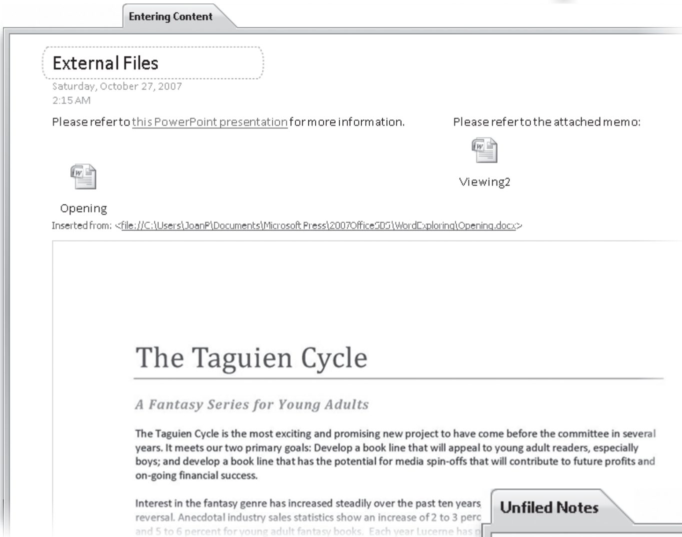
Key Points

- You can create a publication of any length by using Publisher. To save time, plan the design, content, and layout of the publication in advance.
- When text does not fit exactly in a text box, you have many options, including resizing the text and the text box. You can have Publisher automatically resize text to fit the available space.
- You can insert, delete, and move pages in a publication. Each page retains its content. Moving pages that contain continued stories might result in story sections being out of order.
- You can edit story content in Word. All the program functionality other than saving the file is available.
- Publisher includes tools for checking and correcting spelling and for controlling hyphenation.

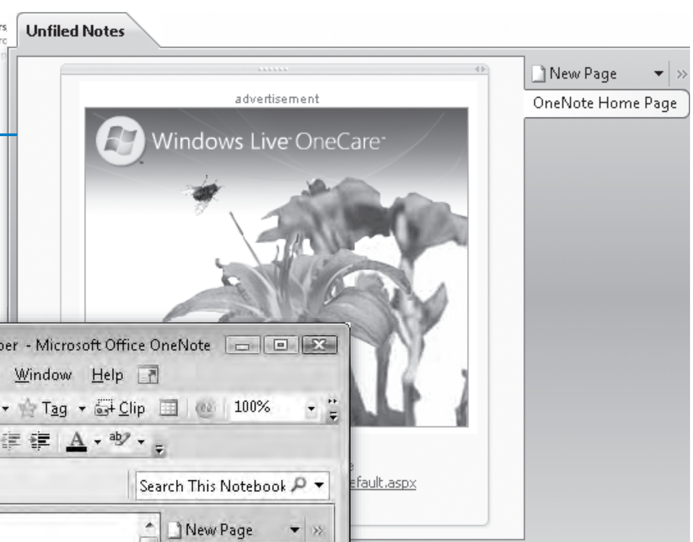
Part VII

Microsoft Office OneNote 2007

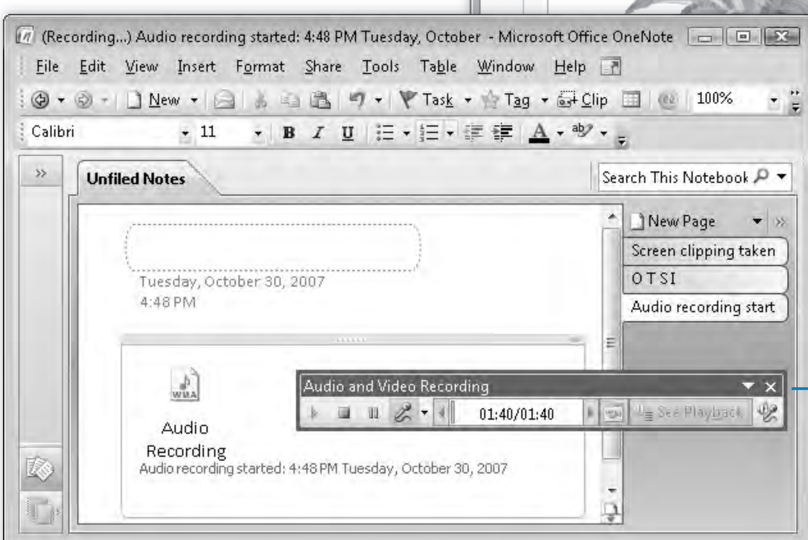
Chapter at a Glance



Enter content directly onto a page, **page 667**



Send content to OneNote, **page 676**



Capture audio and video notes, **page 684**

23 Collecting Information in a Notebook

In this chapter, you will learn to:

- ✔ Understand notebooks and note containers.
- ✔ Enter content directly onto a page.
- ✔ Send content to OneNote.
- ✔ Capture audio and video notes.
- ✔ Quickly capture notes.

Microsoft Office OneNote 2007 is a handy program that makes it possible to electronically store bits and pieces of information. You can use OneNote to collect, save, and safeguard notes in one place, organize them in ways that are logical to you, and then easily locate their information when you need it.

OneNote 2007 provides two primary information collection interfaces: the OneNote program window and the OneNote Side Note utility. In addition, you might find convenient links in other programs—such as the Send To OneNote command on the Windows Internet Explorer Tools menu, and the Send To OneNote 2007 print location available in the Print dialog box of any Windows program—which make it easy to collect information without starting or switching to OneNote. If you have a mobile phone or other device running Windows Mobile, you can capture information by using OneNote Mobile (which comes free with the full version of OneNote 2007), and you can synchronize data with a local or network notebook by using Microsoft ActiveSync.

You can store pretty much any type of electronic information in a OneNote notebook, including text, graphics, photos, Web clippings and pages, hyperlinks, audio clips, and video clips. You can store as much or as little information as you want on each individual page.

In this chapter, you will first learn about notebooks and the way that notes are stored in OneNote. Then you will collect text, graphics, handwritten notes, screen clippings, Web notes, and media clips by using various methods.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Understanding Notebooks

In the same way that the Windows storage structure reflects that of a physical office (with a desktop, folders, and files), the OneNote storage structure reflects a three-ring binder. Each ***notebook*** is divided into ***sections***, and each section is divided into ***pages***. If you view a notebook in Windows Explorer, it is represented by a folder in your *Documents\OneNote Notebooks* folder. Each section of the notebook is stored as an .one file within the notebook folder.

The default OneNote 2007 installation includes three ready-made notebooks: *OneNote 2007 Guide*, *Work Notebook*, and *Personal Notebook*. When you start OneNote for the first time, the program opens the OneNote 2007 Guide. Thereafter, starting the program opens the notebook you worked with in the previous OneNote session.

Tip The *OneNote 2007 Guide* is a reference that provides examples of the types of information you can collect in OneNote and ways that you can work with it. It is worth exploring this notebook before you start working with the program.

You can customize the ready-made notebooks or create your own. The simplest OneNote notebook structure, created by the Blank Notebook template, consists of one section containing one page—a .one file contained in a folder. You can add content to a blank notebook (also known as *populating* the notebook) and then organize it into pages and sections, or you can create an organizational structure and then populate it. The best method will vary depending on the way you plan to use the notebook—whether you are working on a highly structured project or collecting a wide variety of information.

When you want to start by creating the organizational structure, you might find it convenient to base a new notebook on one of the eight specialized notebook templates that come with OneNote 2007. Additional notebook templates available from Microsoft Office Online are designed to help facilitate a variety of situations, such as planning a landscape project or a wedding, house hunting or moving, and various legal situations.

Regardless of the notebook template you choose, you can easily create new sections and new pages on which to collect and organize information.

Working with Multiple Notebooks

You can have multiple notebooks open at one time, and you can easily switch between two notebooks without specifically saving the content you've been working with. If you don't need to access an open notebook any more, you can close it.

To open a notebook:

1. On the **File** menu, point to **Open**, and then click **Notebook**.
2. Browse to the *Documents\OneNote Notebooks* folder.
3. Click (don't double-click) the folder representing the notebook you want to open, and then click **Open**.

To close a notebook:

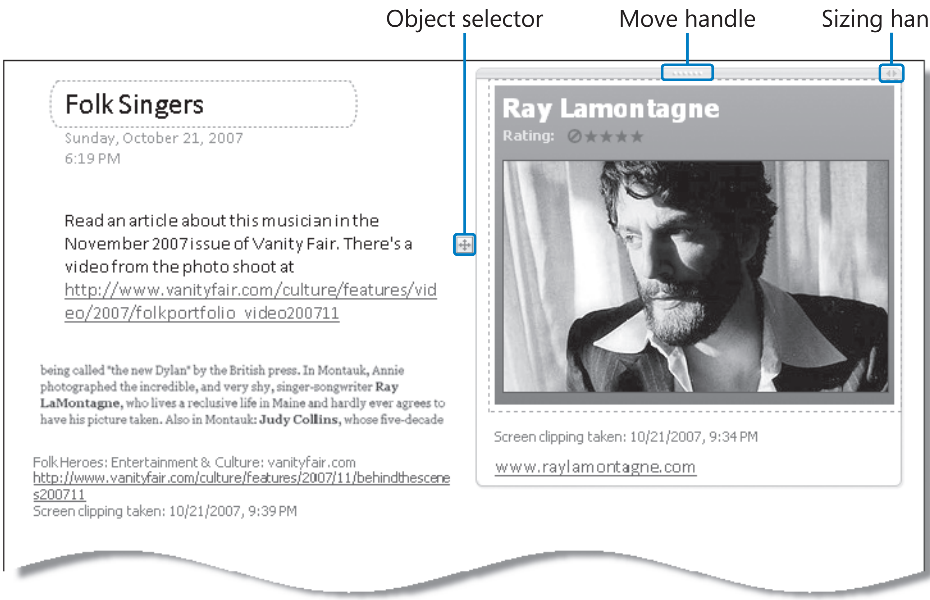
➜ On the **Navigation Bar**, right-click the notebook button, and then click **Close this Notebook**.

or

➜ On the **File** menu, click **Close this Notebook** to close the active notebook.

Understanding Note Containers

Each unit of content on a notebook page exists within a ***note container***. Similar to a text box in Microsoft Office Word or Microsoft Office PowerPoint, a note container consists of a frame that has a ***move handle*** and a ***sizing handle***. Each object (such as a text block, image, or URL) within the note container has an ***object selector***.



Unlike a text box in other programs, a note container doesn't have to be inserted on the page before you can enter content into it—simply click anywhere on the page and type or paste content, or insert it from another source, to create the container. A note container may contain any sort of content, such as text, images, handwritten notes, screen clippings, or Web notes.

You can manipulate a note container on the page in the same way that you would manipulate a text box or other type of content frame in a word-processing or graphics program. You can change its size, relocate it on the page, and cut, copy, or delete it. You can merge the contents of multiple note containers, which is simpler than cutting content from one and pasting it into another.

The contents of an entire page may occupy one note container or many. While you work in OneNote, the frame of the active note container is visible, but the frames of the other note containers are not. Pointing to the content displays the note container's frame, and pointing to an object within the active container displays the object selector. You can manipulate individual objects within the container by dragging, clicking, or right-clicking the associated object selector.

Entering Content Directly onto a Page

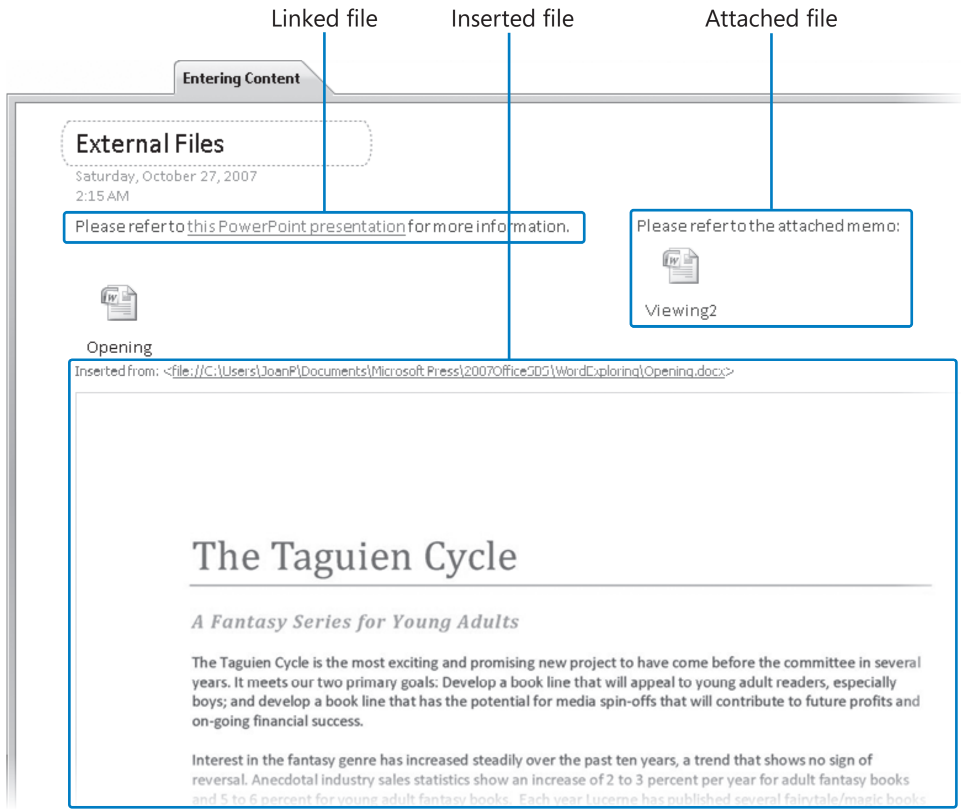
The simplest type of information you will store in your OneNote notebook, and probably the most common, is text. You can enter text by typing directly on the notebook page or by pasting it from another source. But you aren't limited to simple text entry. You can insert attachments, formatted file contents, images, multimedia objects, and handwritten notes, all with a minimum amount of effort.

> **Tip** When deciding how much information to include on a notebook page, consider whether you want to scroll the page. If you want to see all the information at a glance, limit the content to about 30 lines of standard text.

Referencing External Files

When conducting research, you might identify an entire file of information—such as a document, image, or video clip—that you want to include in your notebook. You can store this information in the following three ways:

- Link to the external file on a local drive, network drive, or Web site.
- Insert the file as an attachment.
- Insert the file's contents.



See Also For information about capturing multimedia clips directly in OneNote, see "Capturing Audio and Video Notes" later in this chapter.

> **Tip** OneNote automatically inserts the date and time when you send content from another source to OneNote. (See "Sending Content to OneNote," later in this chapter.) To add this information to notes that you enter directly, click Date And Time on the Insert menu.

Creating Handwritten Notes

On any computer that has a mouse, you can enter "handwritten" notes by using a pen tool that you control with the mouse. On a Tablet PC, you can enter handwritten notes by using the ***tablet pen***, just as you would in other handwriting-enabled programs.

> **Tip** OneNote automatically saves all your changes, so you don't need to. For this reason, you will never be prompted to choose whether to save a notebook when you close it.

Inserting Images

You can easily insert one or more photos or other image files onto a OneNote page by pointing to Pictures on the Insert menu and then clicking From Files. In the Insert Picture dialog box, you can select as many image files as you want to insert on the page.

Keep in mind that images will come in at their original size, which might be considerably larger than you want to view them on the page. To resize an inserted image:

1. Point to the edge of the image so that a dashed outline appears. When the pointer changes to a four-headed arrow, click the image outline.

   Sizing handles appear in the corners and at the center of each side of the image.

2. Drag a sizing handle to resize the image in one of the following ways:
   - Drag a corner sizing handle to maintain the image's ***aspect ratio***.
   - Drag an edge handle to resize the image in one direction only.

The *OneNote 2007 Guide* states that you can also insert clip art (graphics, photos, sounds, and movies) into your notes. It's true that you can, but not in the way you might be accustomed to—there is no Insert Clip Art command in OneNote as there is in practically every other Office system program. To insert clip art, you must first access the clip art data source from another program or from the Microsoft Clip Organizer.

To insert clip art from another program:

1. In Word (or another program that supports clip art), click the **Clip Art** button in the **Illustrations** group on the **Insert** menu.
2. In the **Clip Art** task pane, locate the clip art you want.
3. Point to the clip art, click the arrow that appears, and then click **Copy**.
4. Switch to OneNote, and paste the clip art from the Clipboard onto the page.

To insert clip art from the Clip Organizer:

1. On the **Start** menu, click **All Programs**, click **Microsoft Office**, click **Microsoft Office Tools**, and then click **Microsoft Clip Organizer**.
2. In the **Clip Organizer**, locate the clip art you want.
3. Point to the clip art, click the arrow that appears, and then click **Copy**.
4. Switch to OneNote, and paste the clip art from the Clipboard onto the page.

Formatting Notes, Pages, and Sections

You can change the appearance of text in notes, in much the same way that you do in other Microsoft Office system programs.

OneNote supports character-level formatting such as font face, size, and color, but doesn't support styles. So, for example, you can indicate a heading within text by formatting the characters as bold or in a larger font, but you can't format it or assign it an outline level by applying a style. You can, however, assign outline levels (1 through 5) to paragraphs by indenting the paragraph. OneNote allows you to choose to hide levels, which gives you the equivalent of an outline view.

To change the paragraph indentation for the purpose of assigning a level:

1. Click to place the insertion point at the beginning of the paragraph.
2. Press the Tab key to increase the level, or press the Backspace key or Shift+Tab to decrease the level.

To hide one or more levels of text within a note:

➜ Right-click the note container header, point to **Hide Levels Below**, and then click the lowest level you want visible.

OneNote does not support as many paragraph formatting options as you might be accustomed to using within a typical word-processing program such as Word. You can change the width of all the paragraphs in a note by dragging the right edge of the note container. However, you can't do any of the following:

- Change the width of an individual paragraph (except by inserting carriage returns).
- Change the paragraph alignment to right-align, center, or justify its content.
- Outline a paragraph.

By default, OneNote displays notebook pages with a blank white background. You can modify the appearance of the page in several ways. For example, you can:

- Change the page size, orientation, or margins.
- Change the page background to a picture, or to any of 16 pre-selected background colors. The available colors are reasonably muted so they don't obscure the page content.
- Display any of four horizontal rule patterns (Narrow, College, Standard, and Wide) or four grid rule patterns (Small, Medium, Large, and Very Large).
- Hide or change the color of the rule lines.

These and other options are available from the Page Setup task pane, which you can display by right-clicking a page tab and then clicking Page Setup.

Tip Changing the size, orientation, background, or other attribute of a page does not affect other pages of the notebook.

You can change the color of a section tab and the pages within the section by clicking the page tab, pointing to Section Color, and clicking the color you want.

In this exercise, you will enter text; insert, attach, and manipulate images; and create a handwritten note by using the OneNote writing tools.

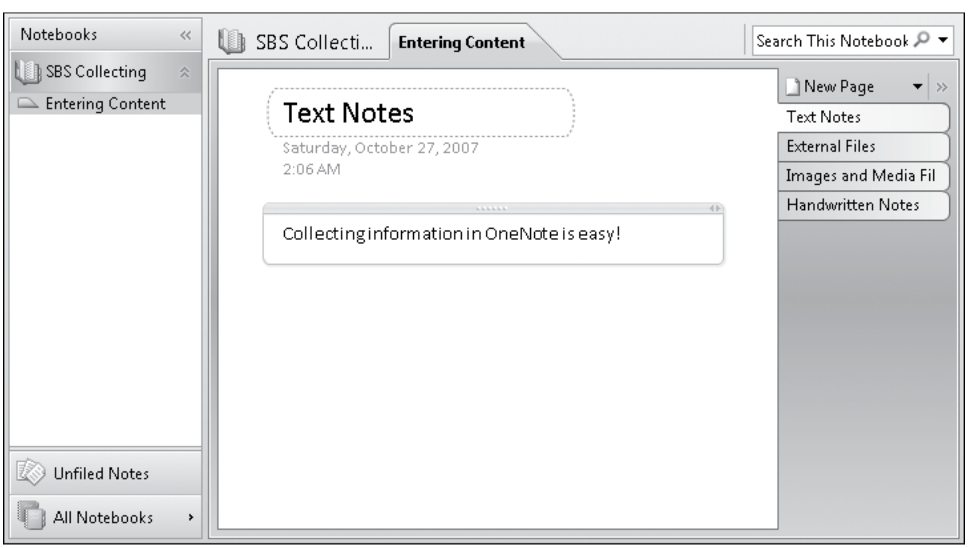
USE the *SBS Collecting* notebook, the *Organization101* presentation, and the *Arizona01*, *Arizona02*, *Arizona03*, and *Logo_ADatum* images. These practice files are located in the *Documents\Microsoft Press\2007OfficeSBS\OneCollecting* folder.

BE SURE TO start OneNote before beginning this exercise.

OPEN the *SBS Collecting* notebook, and display the Entering Content section.

1. On the **Text Notes** page, click to position the insertion point on the page, and then type **Collecting information in OneNote is easy!**

   OneNote creates a visible note container when you type the first character, and then expands the note container to fit the remaining text.



2. On the **Insert** menu, click **Files as Printouts**.

   The Choose Document To Insert dialog box opens.

3. Browse to the *Documents\Microsoft Press\2007OfficeSBS\OneCollecting* folder. Click the *Organization101* presentation, and then click **Insert**.

   OneNote inserts the presentation file as an attachment, the Inserted From reference, and then each slide of the presentation. Each slide is an individually sizable object.

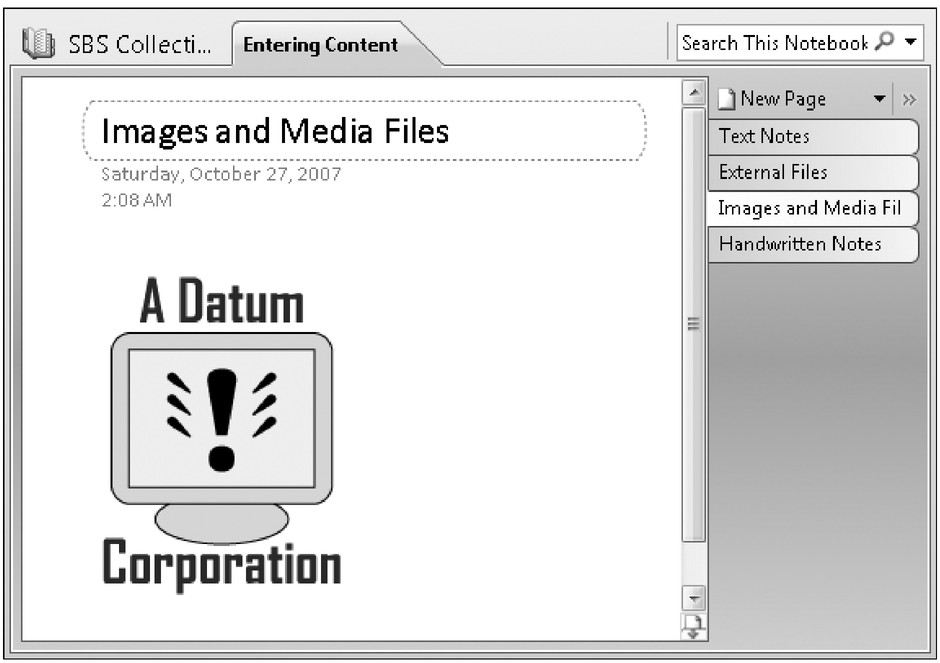
4. In the **Page Tabs** area, click the **Images and Media Files** page tab.

5. On the **Insert** menu, point to **Pictures**, and then click **From Files**.

   The Insert Picture dialog box opens.

6. If necessary, browse to the *Documents\Microsoft Press\2007OfficeSBS\OneCollecting* folder. Click the *Logo_ADatum* image, and then click **Insert**.

   The inserted image appears on the page.



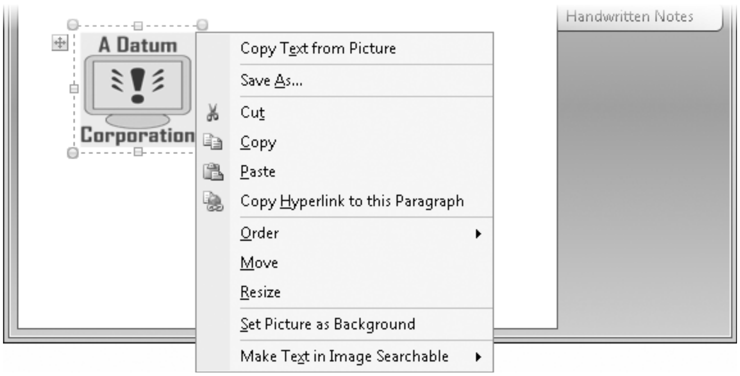
7. Point to the inserted image.

   Instead of a note container, a dotted outline appears, to indicate that the image can be sized on the notebook page.

8. Click the image.

   Sizing handles appear on each side and corner of the inserted image.

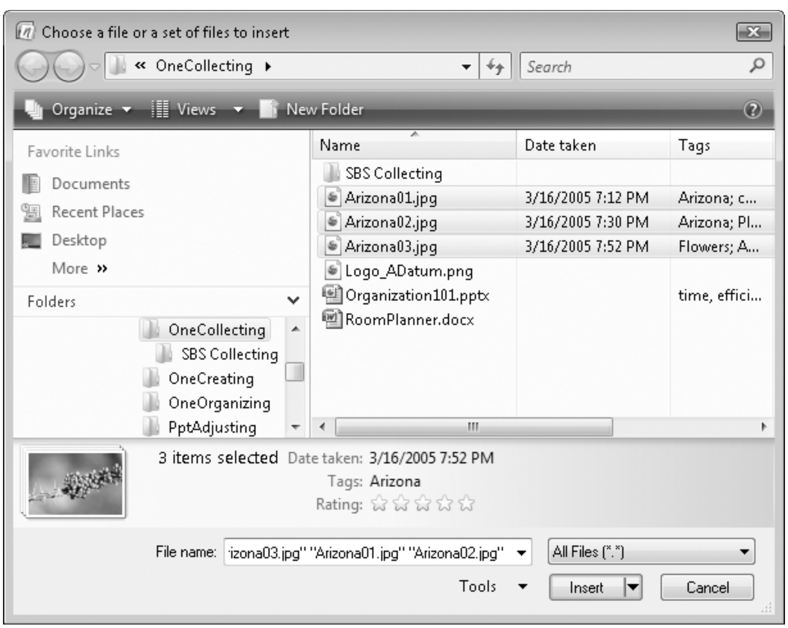
9. Drag the handles to change the height and width of the image, making it smaller and roughly square.
10. Right-click the image to view the additional options.



11. Click to place the insertion point to the right of the logo. Then on the **Insert** menu, click **Files**.

    The Choose A File Or Set Of Files To Insert dialog box opens.

12. If necessary, browse to the *Documents\Microsoft Press\2007OfficeSBS\OneCollecting* folder. Click the *Arizona01* image, hold down the Shift key, and then click the *Arizona03* image.

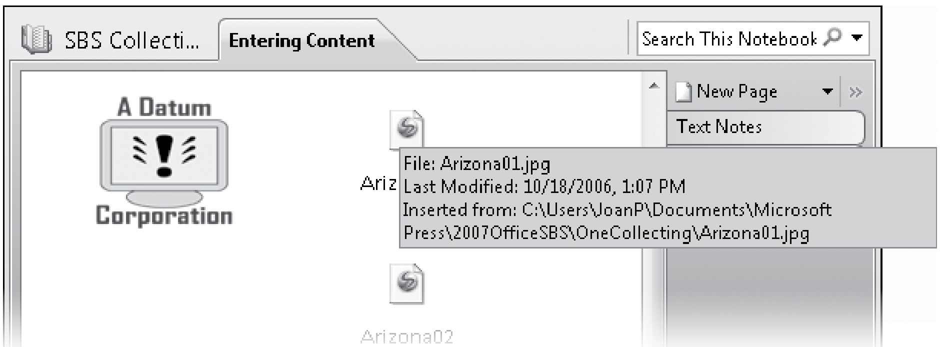


13. In the **Choose a file** dialog box, click **Insert**.

    The icons and filenames representing the inserted images appear on the page.

> **Troubleshooting** The displayed icons represent the program that is set up on your computer as the default program for this file type (the program the file opens in when you double-click it). The icons shown on your notebook page might not match the icons shown here.

14. Point to the *Arizona01* image to display a ScreenTip containing file information.

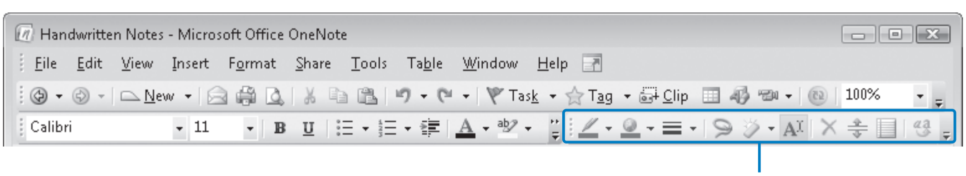


15. Double-click the *Arizona01* image. If a warning message appears, select the **Don't show this again** check box, and then click **OK**.

    The image opens in the default program.

16. Close the image to return to OneNote.

17. Display the **Handwritten Notes** page. Right-click in the toolbar area, and then click **Writing Tools** to display the **Writing Tools** toolbar. Arrange the toolbars so all the writing tools are visible.



Writing Tools toolbar

Pen

18. On the **Writing Tools** toolbar, click the **Pen** arrow, and then in the list, click **Blue (thin)**.

19. Point to the notebook page.

    The pointer resembles a blue dot.

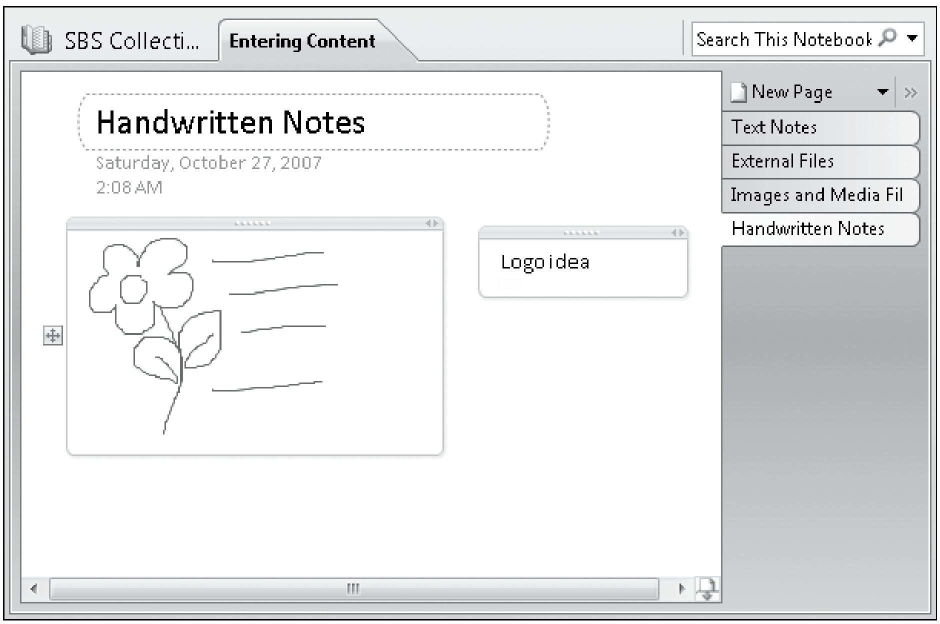
20. By dragging the pen on the notebook page, draw a picture depicting a possible business logo.


Type Text or Select Object

21. On the **Writing Tools** toolbar, click the **Type Text or Select Object** button. Then point to your drawing.

    A note container appears around the drawing.

22. Click to place the insertion point on the page to the right of the note containing the logo, and then type Logo idea.



23. Experiment on your own with additional pens, colors, and commands from the Writing Tools toolbar.

CLOSE the Writing Tools toolbar and the *SBS Collecting* notebook.

Sending Content to OneNote

Collecting on-screen information in a OneNote notebook falls under the "easiest thing since sliced bread" classification. You can send content from any screen to OneNote as a ***screen clipping***, or send an entire Web page as a Web note. When viewing a Web page, you can send the entire page to your notebook without leaving Internet Explorer.

When you clip or send content to OneNote, OneNote stores it temporarily in the ***Unfiled Notes section***. Unfiled Notes is not part of any notebook; it is a separate file stored in your *Documents\OneNote Notebooks* folder. Screen clippings and Web notes remain in the Unfiled Notes section until you move them elsewhere. When it is convenient to display the OneNote program window, you can move either the screen clipping's note container or the entire page to any notebook.

See Also For more information about moving notebook content, see "Moving and Removing Information" in Chapter 24, "Organizing and Locating Information."

Tip You can create pages directly in the Unfiled Notes section.

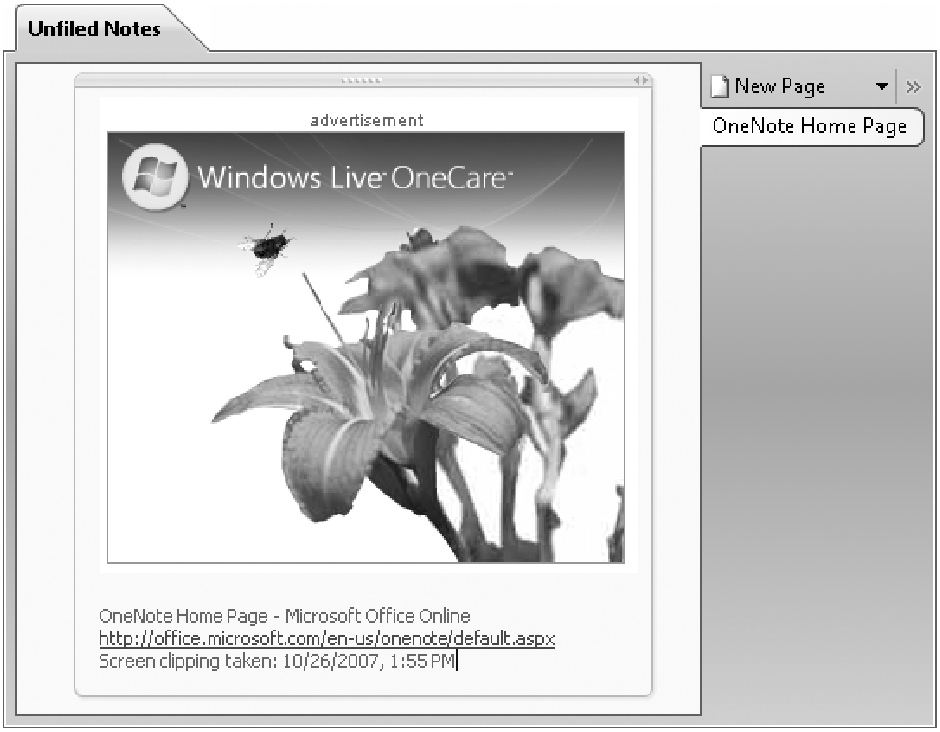
Collecting Screen Clippings

The screen clipping feature first became available as an add-in to OneNote 2003 and is fully incorporated into OneNote 2007. You can use the OneNote Screen Clipper to capture an image of anything that is visible on your computer screen. After you display the content you want to send to OneNote, you can start the Screen Clipper in several ways, including the following:

- If your keyboard has a ***Windows logo key***, press Windows logo key+S.
- Right-click the OneNote icon in the notification area of the taskbar, and then click Create Screen Clipping.

- In the OneNote program window, click the Clip button on the Standard toolbar, or click Screen Clipping on the Insert menu.

When the Screen Clipper is active, a transparent white overlay appears on the screen, and instructions in a notification explain how to capture the screen clipping. Drag with your mouse or pen to define the area you want to "clip." (As you drag, the white overlay becomes clear in the area you define.) When you release the mouse button or lift the pen, the clipping appears on a new, untitled page of the Unfiled Notes section, along with the date and time you created the clipping. If you clipped content from a Web page, the Web page name and URL are also stored in the note container, and the notebook page title is set to the Web page name.



You can specify what you want OneNote to do with screen clippings, by setting the default action. The options are:

- **Copy To Clipboard Only.** OneNote copies the screen clipping to the Clipboard. You can paste it into OneNote or another application by pressing Ctrl+V or by using the Paste command in the application.
- **Copy To Clipboard And Unfiled Notes (Show Image).** This is the default setting. OneNote copies the screen clipping to the Clipboard, pastes it into your Unfiled Notes section, and displays the OneNote window so that you can verify that the content was clipped, add notes to it, or move it to another section.
- **Copy To Clipboard And Unfiled Notes (Don't Show Image).** This setting allows you to continue working uninterrupted. OneNote copies the screen clipping to the Clipboard and pastes it into your Unfiled Notes section but does not display the OneNote window.

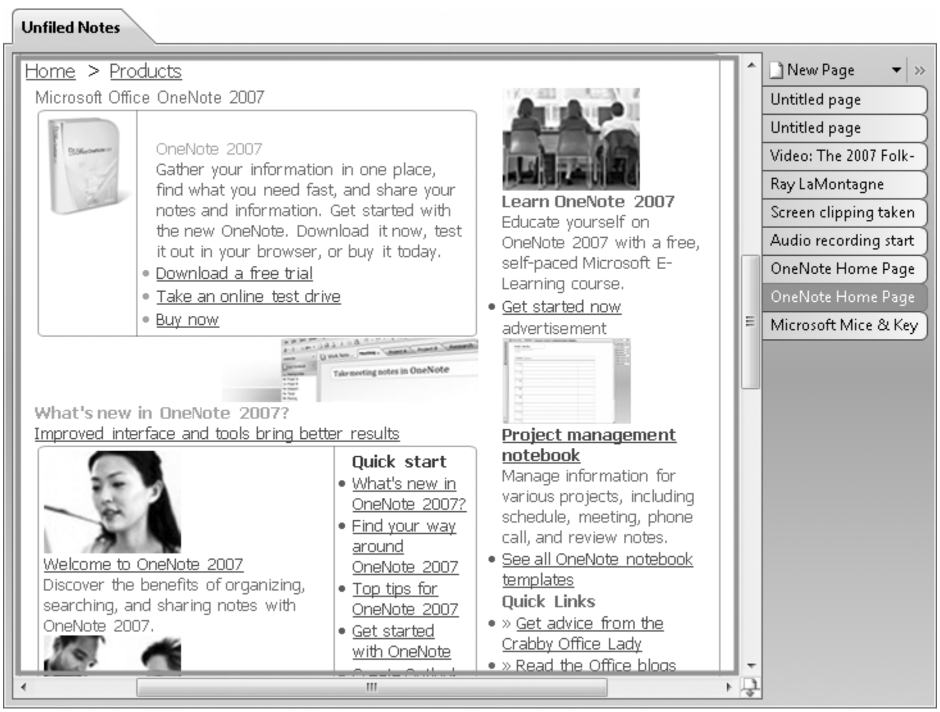
To change the default action, right-click the OneNote icon in the notification area of the taskbar, point to Options, point to Screen Clipping Defaults, and then click the setting you want.

Collecting Web Notes

From Internet Explorer, you can send an entire Web page to OneNote. To capture a Web note:

1. Display the Web page you want to send to OneNote.
2. On the **Tools** menu, click **Send to OneNote**.

OneNote processes the Web note in the background while you continue working in Internet Explorer and stores the Web note in the Unfiled Notes section. As was the case with the screen clipping taken from a Web site, the Web page title appears as the note page title. The Web page content—including text, images, hyperlinks, and similar content—appears on the note page. Depending on the complexity of the content, you might notice that the page layout in OneNote doesn't precisely reflect the on-screen layout. If the page formatting depends on styles stored in an external style sheet, the fonts, sizes, and other elements controlled by the style sheet will not be displayed as intended.



You can specify where you want OneNote to save the information you send to OneNote from Internet Explorer or through the Send To Microsoft OneNote print driver. Use one of the options on the following page.

- **New Page In Section.** This is the default setting. OneNote creates a new page for each note in the Unfiled Notes section or another section that you specify.
- **New Page In The Current Section.** OneNote creates a page in whatever section is currently active.
- **On The Current Page.** OneNote adds the Web page content to the active page.

To change the default location, click Options on the Tools menu, display the Send To OneNote page, select the Web note and printout locations you want, and then click OK.

In this exercise, you will create a screen clipping, a Web page screen clipping, and a Web note. Then you will delete all the captured notes. There is no practice file for this exercise.

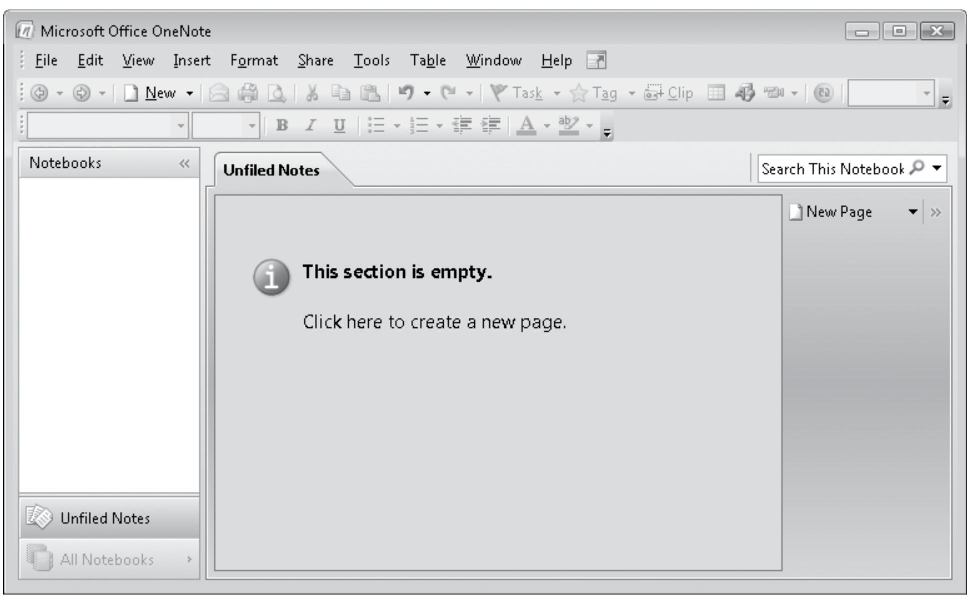
BE SURE TO close or minimize any open windows. Then start OneNote and close any open notebooks before beginning this exercise.


Unfiled Notes

1. At the bottom of the **Navigation Bar**, click the **Unfiled Notes** button.

Tip When the Navigation Bar is expanded, the button name appears next to its icon.

OneNote displays either the empty section or an untitled page; or, if you already have unfiled notes, the most recently viewed or collected page.



Tip If no page is active, many toolbar and menu commands are unavailable.


Minimize

2. On the OneNote title bar, click the **Minimize** button to display your Windows desktop.

   A Windows taskbar button represents the minimized program window.


OneNote icon

3. In the notification area at the right end of the taskbar, right-click the **OneNote** icon, and then click **Create Screen Clipping**.

   See Also The ScreenTip that appears for this notification area icon changes depending on the default action associated with it. For more information about the functionality of this notification area icon, see "Quickly Capturing Notes" later in this chapter.

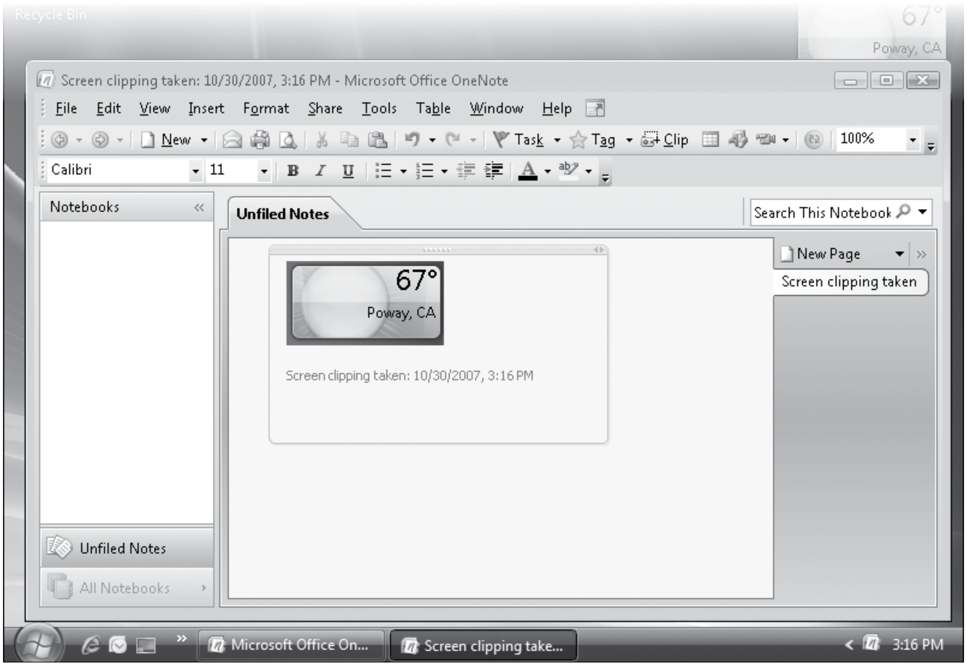
   A translucent white screen covers the desktop.

> **Tip** If you change your mind about taking the screen clipping, press the Esc key to remove the white screen.

4. Drag to select an area of your desktop (preferably an area displaying something interesting).

   As you drag, the screen covering the selected area becomes clear, so you can see the content you are selecting. When you release the mouse button, a second OneNote window opens, displaying the Unfiled Notes section and a new page

containing your screen clipping. (The second taskbar button indicates that this is a second window.) The note container might be active or inactive, depending on the position of your pointer.



> **Troubleshooting** If the OneNote window doesn't open, your default Screen Clipping action might be set to only copy the image to the Clipboard or to not display the image. For more information, see the "Collecting Screen Clippings" section of this topic.

The OneNote title bar and associated taskbar button, the page tab, and the screen clipping note container all identify the date and time the screen clipping was taken.

5. Click to place the insertion point under the collected screen clipping.
6. Start Internet Explorer, and display a Web site of your choice.

   For the purposes of this exercise, we are using our company Web site at *www.otsi.com*.
7. Press ⊞+S (hold down the ⊞ key and then press the S key).

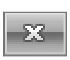
> **Troubleshooting** If your keyboard does not have a Windows logo key, switch to the OneNote screen clipping window. Then on the Insert menu, click Screen Clipping.

A translucent white screen covers the displayed Web page. Any active animation on the page is frozen.

8. Drag to select an area of the Web page.

   When you release the mouse button, OneNote adds the screen clipping to the Unfiled Notes section, where you placed the insertion point. Notice that the program window title bar still reflects the date and time of the original screen clipping.

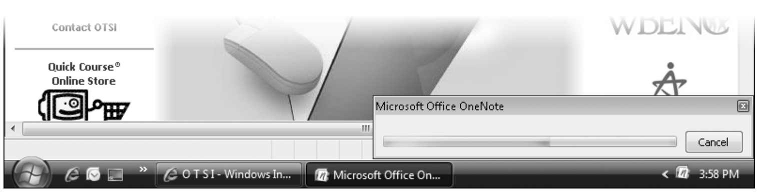
> **Tip** If you take a screen clipping without placing the insertion point on the page, OneNote places the clipped content on a new page.


Close

9. On the title bar of the active OneNote window, click the **Close** button.
10. Click the taskbar button of the original OneNote program window.

    Notice that the screen clipping page is immediately visible in this window.
11. Right-click the taskbar button of the active OneNote window, and then click **Close**, leaving only the Internet Explorer window open.
12. On the **Tools** menu, click **Send to OneNote**.

    A window displaying a progress bar appears briefly in the lower-right corner of the screen, and a corresponding taskbar button appears on the taskbar.



When the progress bar reaches the end, the Web note has been successfully stored on a new page in the Unfiled Notes section.

13. If necessary, switch to OneNote to view the collected Web page.

    The previous screen clipping page tab is also visible.

> **Troubleshooting** If the Web note is inserted on the same page as the screen clippings, or in a section other than Unfiled Notes, your Web Notes collection location might be set to something other than the default. For more information, see the "Collecting Web Notes" section immediately preceding this exercise.

14. Compare the captured Web note to the original page content. At the bottom of the page, note the Inserted From link back to the original page.
15. In the **Page Tabs** area, click the active page tab, and press Ctrl+A to select all the pages in the Unfiled Notes section. Then press Del to remove them from OneNote.

> **Troubleshooting** OneNote does not prompt you to confirm the deletion of the selected pages. If you accidentally delete content that you want to restore, click Undo Delete on the Edit menu (or press Ctrl+Z).

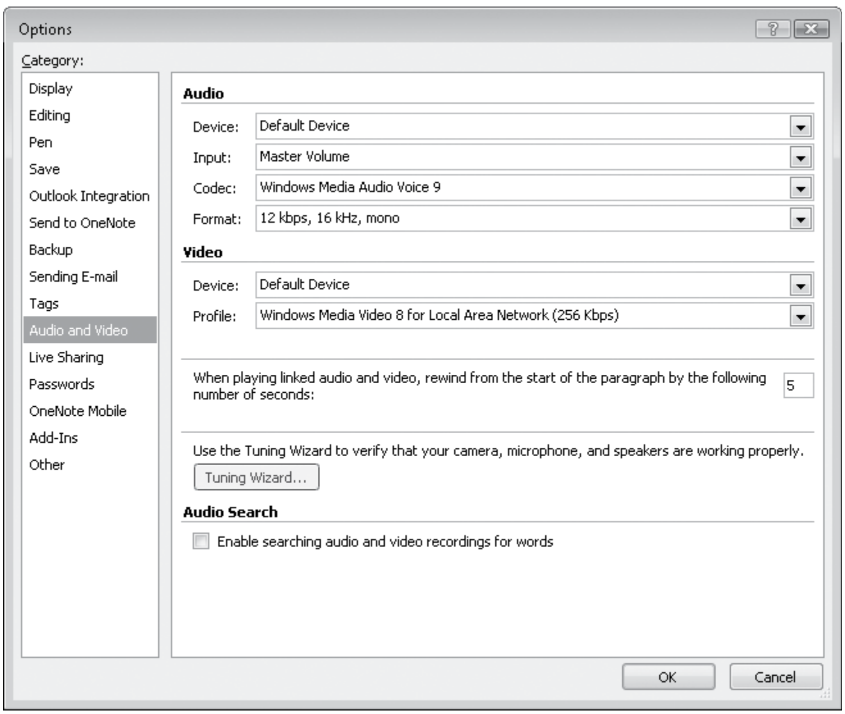
CLOSE the Internet Explorer window.

Capturing Audio and Video Notes

If your computer system includes a microphone, such as a built-in microphone or (preferably) a freestanding or headset peripheral microphone, you can record audio directly into OneNote. Similarly, if your system includes a video camera, such as a Web cam, you can record video directly into OneNote.

If you haven't already configured your audio and video input and output devices by using the wizards available through Windows, you can do so in OneNote by using the Tuning Wizard, which is accessible from the Audio And Video page of the Options window.

Tip To display the Options window, click Options on the Tools menu.



Troubleshooting If you don't have a microphone or camera installed on your system, the lists in the corresponding area will be empty.

See Also For information about searching audio and video recordings, see "Searching for Information" in Chapter 24, "Organizing and Locating Information."

Recording Audio

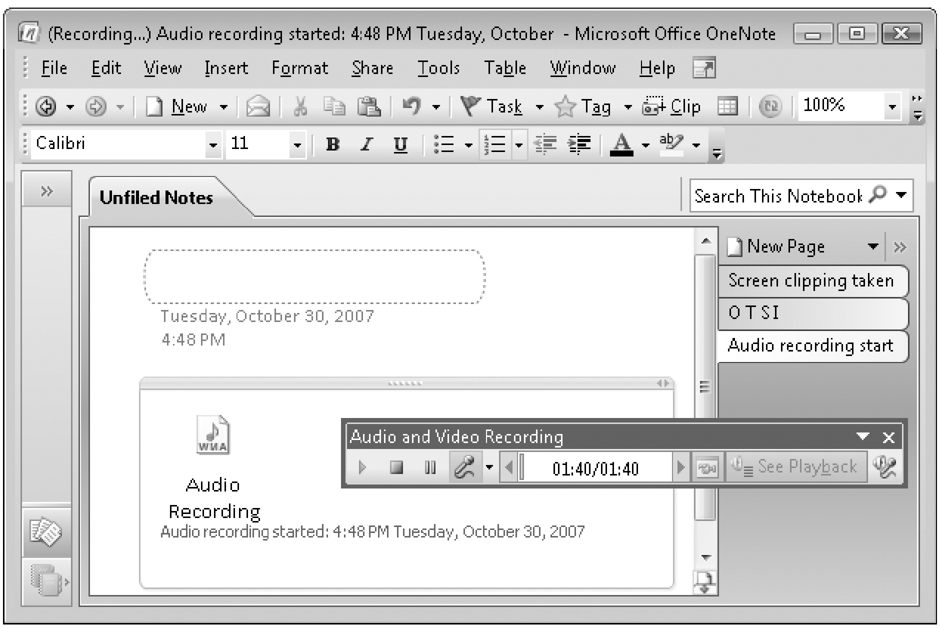
To create an audio recording in OneNote:

1. Ensure that your computer system includes a microphone. If necessary, run the microphone wizard to configure the microphone input levels.

   See Also For information about setting up a microphone or other peripheral device, refer to the *Windows Step by Step* book specific to your version of Windows.

2. Display the page on which you want to insert the audio or video clip.
3. On the **Insert** menu, click **Audio Recording**.

   OneNote inserts an Audio Clip icon indicating the audio file type (based on your choice on the Audio And Video page of the Options window) and the recording start time, and displays the floating Audio And Video Recording toolbar.




Stop

4. Speak, sing, or otherwise deliver the audio content you want to record. When you finish, click the **Stop** button on the **Audio and Video Recording** toolbar.

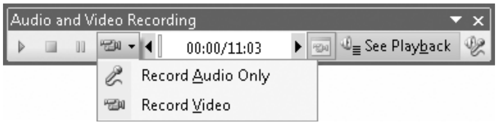
If you haven't previously made an Audio Search selection, the Did You Know About Audio Search window opens.

If you want to make a selection at this time, click the Enable Audio Search or Keep Audio Search Disabled button. Otherwise, you can click the Close button on the window title bar.

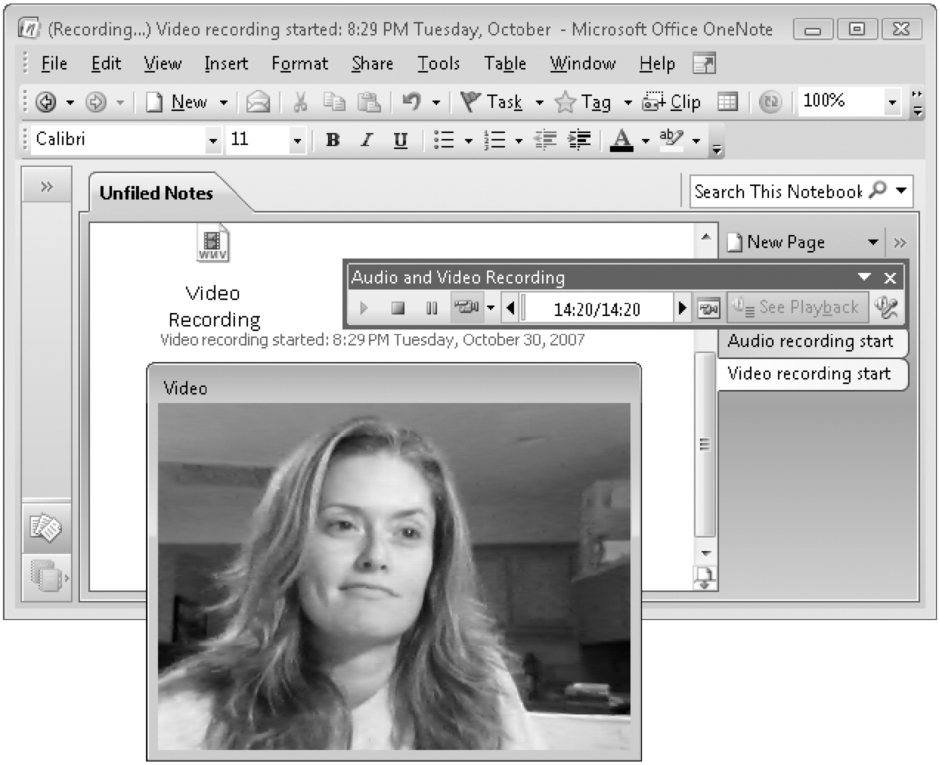
See Also For information about searching audio and video recordings, see "Searching for Information" in Chapter 24, "Organizing and Locating Information."

Recording Video

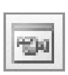
The process for creating a video recording is similar to creating an audio recording. Ensure that your computer system includes a video camera, and display the page where you want the recording to appear. Then click Video Recording on the Insert menu, or click the Record arrow on the Audio And Video Recording toolbar, and then click Record Video.



OneNote inserts an icon indicating the video file type (based on your choice on the Audio And Video page of the Options window) and the recording start time, and displays the floating Audio And Video Recording toolbar, if it isn't already displayed. A video window opens, displaying the video input from your camera.



Naturally, the quality of the video you capture depends greatly on the video camera, lighting, setting, and other factors not specific to OneNote.


Hide Video Window

The video window is a "stay on top" window. You can move it around the screen (independently of the program window) by dragging its title bar, and change its size by dragging the outer borders. If you don't want to display the video window while you capture the video clip, click the Hide Video Window button on the Audio And Video Recording toolbar.

Playing Back a Recording

You can pause, stop, and start recording by clicking the buttons on the Audio And Video Recording toolbar; but, as implied by its name, you can't play back the recordings. To play back an audio or video recording, double-click the Audio Clips or Video Clips icon on the notebook page.

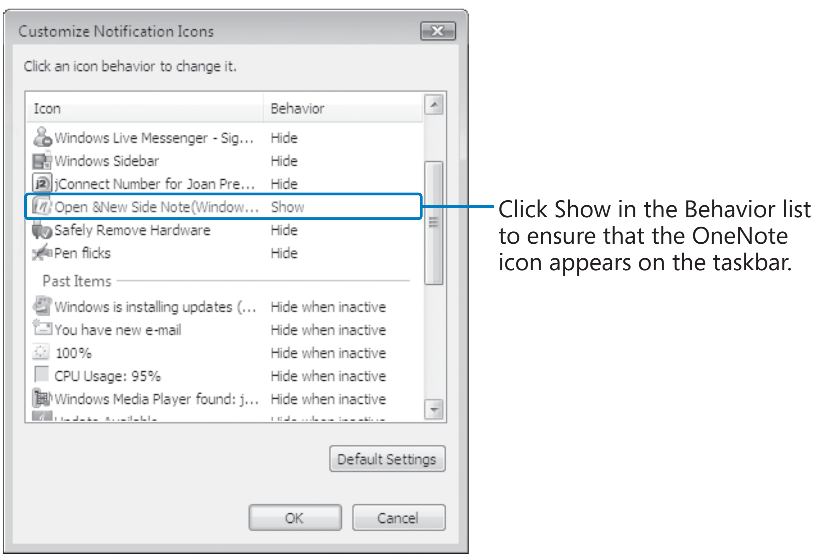
Where Is the OneNote Icon?

If the OneNote icon does not appear in the notification area when the program is running, follow these steps to verify that the feature is turned on:

1. In OneNote, click **Options** on the **Tools** menu.
2. In the **Options** window, in the **Category** list, click **Other**.
3. Select the **Place OneNote icon in the notification area of the taskbar** check box, and then click **OK**.

If the check box is selected and the icon still doesn't appear, follow these steps to verify that the icon is not hidden:

1. Right-click a blank area of the taskbar or notification area, or the Windows **Start** button, and then click **Properties**.
2. In the **Taskbar and Start Menu Properties** dialog box, display the **Notification Area** tab.
3. In the **Icons** area, click **Customize**.
4. In the **Icon** list, locate the **One Note** icon (the label will vary depending on the action assigned to it). Click the corresponding behavior, and then in the list, click **Show**.



5. Click **OK** twice to close the dialog boxes and save your changes.

Quickly Capturing Notes

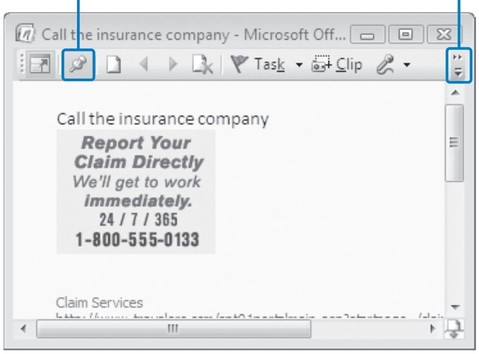
It is not necessary to start OneNote each time you want to take notes or otherwise store information. You can quickly activate an input interface by clicking the OneNote icon that appears in the notification area of the Windows taskbar. Clicking the icon or pressing Windows logo key+N opens a Side Note into which you can immediately type or paste information.

You can also open a Side Note from within the OneNote program window by clicking New Side Note Window on the Window menu, or by pressing Ctrl+Shift+M.

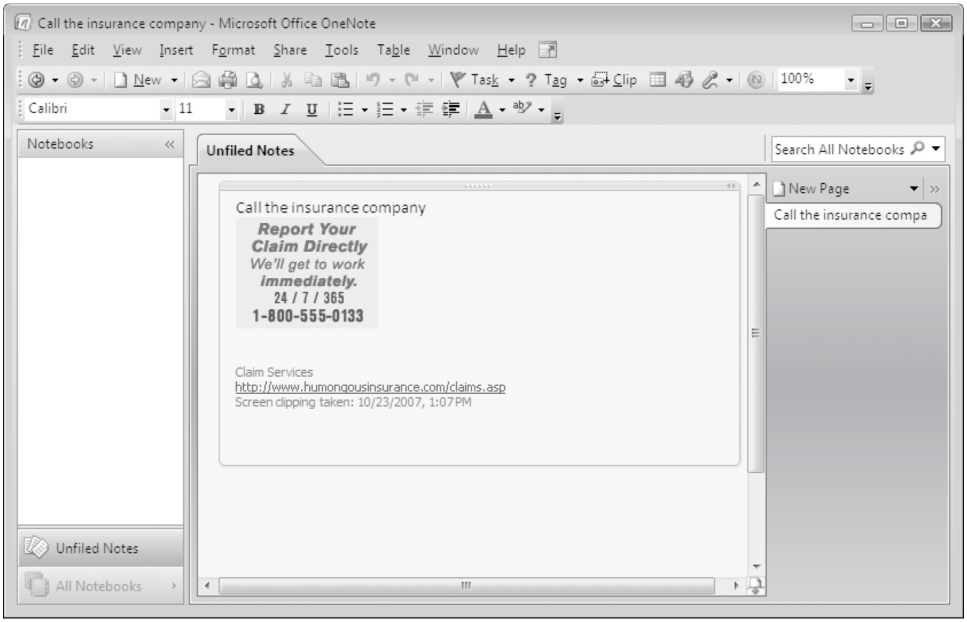
The toolbar at the top of the Side Note window is the same toolbar that appears when you display a page in Full Page view in the OneNote program window. You work with content in a Side Note in the same way you work with it in the OneNote program window—because, in fact, that is precisely what you are doing. If you click the Full Page View button in the Side Note window (and then enlarge the window to provide perspective), you will find yourself working in a page in the Unfiled Notes section.

Keep Window On Top button

Toolbar Options button



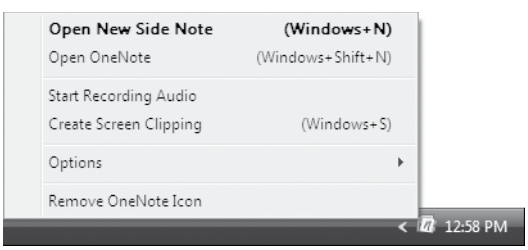
The purpose of the Side Note window is to provide a small and easily accessible interface to OneNote. Because of the small size of the Side Note window, only a few commands are accessible at a time. You can choose a command that is not visible by clicking the Toolbar Options button and then clicking the button you want.



Troubleshooting The Full Page View toolbar changes to display the commands you use most often. The commands shown on your toolbar will not necessarily match those shown in this book.

When the Keep Window On Top button is active, you can position the Side Note in a convenient location on your screen, changing its size as necessary, and enter information as you want to. When the Side Note window is on top, it can get in the way of other windows, information, or commands that you might want to access, so you will want to choose a location that doesn't interfere with your work. You can change the height or width of the window by dragging any side or corner of it.

Right-clicking the OneNote icon displays a list of options for collecting information.



You can change the action that occurs when you click the OneNote icon to suit your needs. For example, if you frequently record audio, you might make that the default action. The available actions are Open New Side Note (the default), Open OneNote, Start Recording Audio, and Create Screen Clipping.

To change what happens when you click the OneNote icon:

➜ Right-click the **OneNote** icon, point to **Options**, point to **OneNote Icon Defaults**, and then click the action you want.

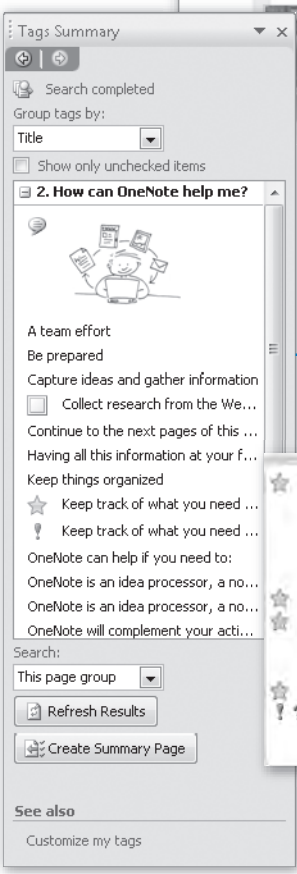
CLOSE any open notebooks. If you are not continuing directly to the next chapter, exit OneNote.

Key Points

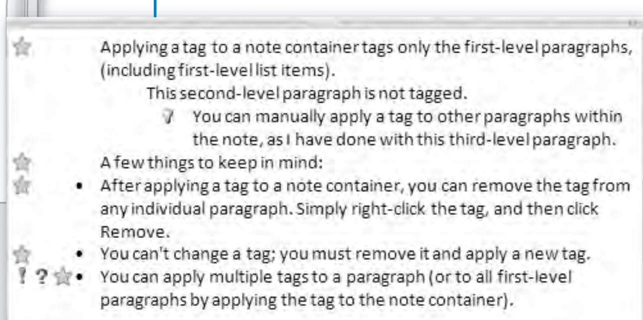
- Notes are stored on a page in note containers. Each object within a note container can be manipulated separately.
- You can resize images inserted on a page and open file attachments directly from a page.
- You can use the OneNote writing tools to create handwritten notes and drawings.
- You can collect and store selected images of anything displayed on your screen by using the Screen Clipper.
- You can collect and store an entire Web page by using the Send To OneNote command on the Internet Explorer Tools menu.
- You can jot down a quick note by clicking the Open New Side Note icon in the notification area of the taskbar, or by pressing Windows logo key+N to open a Side Note.
- You can choose the action that occurs when you click the OneNote icon.

Chapter at a Glance

Move and remove information, **page 694**



Tag notes, **page 702**



24 Organizing and Locating Information

In this chapter, you will learn to:

- ✔ Move and remove information.
- ✔ Tag notes.
- ✔ Search for information.

In the previous chapter, we discussed collecting and storing information of many types from many sources in Microsoft Office OneNote 2007. If you use OneNote on a regular basis, you will soon have a large collection of information. And chances are, even if you start out with a logically organized notebook, you will need to restructure content from time to time.

OneNote provides several means by which you can call attention to a note for a specific purpose or make it easier to retrieve one note or related notes stored on different pages and in different sections. One method, using OneNote tags, enables you to assign notes to different categories and then generate a report containing the categorized notes. With OneNote, you can also search across many more types of information than you are accustomed to, making it easy to find stored information.

In this chapter, you will learn how to move information on a page, between pages, between sections, and between notebooks. You will learn how to restructure a page after deleting content, tag notes for organizational purposes, and flag notes for follow-up. Finally, you will learn how to search for content within a OneNote notebook.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Moving and Removing Information

The techniques you use to move and delete content within a note container are largely the same as those you use in other 2007 Microsoft Office system programs, so we won't use up valuable space discussing those editing techniques here. However, to organize content within a notebook, you also need to know how to manipulate the note container itself, as well as pages, sections, and entire notebooks.

Manipulating Objects on a Page

You can move a note, file, image, or other object on a page in several ways. For example, you can:

- Drag the note by its header.
- Select the note, and then drag it by any part. (The pointer changes to a four-headed arrow to indicate that you can drag.)
- Right-click the note, click Move, and then press the arrow keys (or hold down the Ctrl key and press the arrow keys to move in smaller increments).
- Right-click the note header, click Cut, right-click the new note location, and then click Paste.

The final method, cutting and pasting, is the only way to move an object to another page or section.

Tip To merge the contents of two note containers, hold down the Shift key while dragging one note container by its move handle over the other note container. The merged contents appear in separate paragraphs. You can break one note container into two containers by dragging the object selector of any paragraph or object away from the note container to a different location on the page.

When you delete content from a note container, any following content moves to fill the empty space, and the note container shrinks accordingly. When you move, resize, or delete an entire note container, other content on the page does not move to fill the empty space. You can close up empty space between notes on a page by using the Insert Or Remove Extra Writing Space tool available from the Insert menu or the Writing Tools toolbar. (On the Insert menu, this command name is shortened to Extra Writing Space.)

Tip You can split one note into two by using the Insert Or Remove Extra Writing Space tool. With the tool active, point to the place in the note container where you want to separate the information. The pointer changes to a downward-pointing arrow accompanied by a heavy blue horizontal line. Drag downward to separate the note content into two containers.

Moving Pages, Sections, and Notebooks

Moving larger chunks of content is simple. The following table lists some ways you can manipulate pages and sections.

To move this	Do this
A page or subpage within a section	Drag the page tab up or down in the page tab list.
A page to another section	Drag the page tab to the target section tab in the notebook header or in the Navigation Pane.
A page to another notebook	Drag the page tab to the target notebook section in the Navigation Pane.
A section within a notebook	Drag the section tab left or right in the notebook header; or Drag the section tab to the new location in the Navigation Pane; or Right-click the section tab, and then click Move. In the Move Section To dialog box, click the location where you want to move the section, and then click Move Before or Move After.
A section to another notebook	Drag the section tab to the new location in the Navigation Pane; or Right-click the section tab, and then click Move. In the Move Section To dialog box, click the notebook where you want to move the section, and then click Move Into.
A notebook on the Navigation Pane	Drag the notebook title up or down in the Notebooks list.

Note that the target notebook must be open to move content to it by using any of the methods listed in the preceding table.

Accessing Information from Multiple Locations

Sometimes you might find that information you have collected belongs in more than one location within your notebook. For example, you might want to access information about a project both from a page that is specific to that project and from a page or section that is specific to the group working on the project. You could copy the information from one location to the other. If you update the stored information, though, you will need to update it in both places. An alternative that resolves this problem is to keep the information in one place and link to it from another. OneNote provides a simple method of copying a link to the Clipboard from any note or page. When you insert the copied link, it helpfully contains the first 20 or so characters of the text from the target location. You can add more information to the link as necessary.

Simulating a Table of Contents

OneNote doesn't support the use of heading styles, so you can't display a Document Map–type hierarchical view of a notebook's content or insert an automatically created table of contents, as you can in Microsoft Office Word. For this reason, Word is still a superior choice for the collection and organization of large amounts of text.

If you want to create a table of contents for a notebook or section, you can manually insert hyperlinks on one page to provide a means of jumping to other pages or to specific notes on other pages. When you create a hyperlink to a page or note, the hyperlink address refers to that target even if you move the page or note.

In this exercise, you will move a page between sections and move a note between pages. You will also create a hyperlink to a note. Then after deleting an object from a page, you will adjust the remaining space.

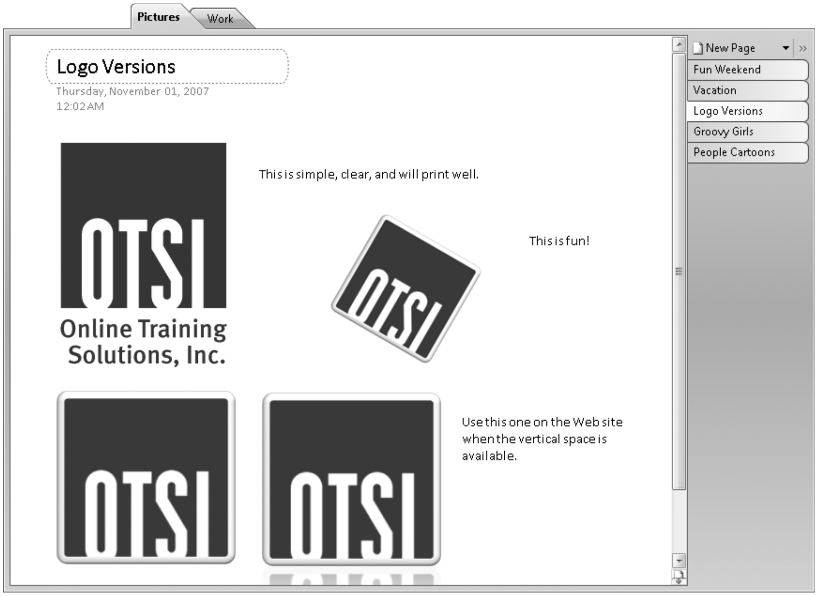
USE the *SBS Moving* notebook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\OneOrganizing* folder.

BE SURE TO start OneNote before beginning this exercise.

OPEN the *SBS Moving* notebook, and collapse the Navigation Bar.

1. In the notebook header, click the **Pictures** section. Then click each page in turn.

   This section contains a few pages of photographs and a page of company logos.



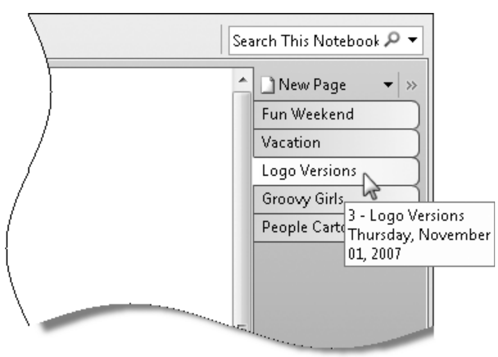
2. In the notebook header, click the **Work** section. Then click each page in turn.

   This section contains information about work-related projects, contacts, and a to-do list.

   The page displaying the company logos belongs in the Work section rather than the Pictures section.

3. Return to the **Pictures** section, click the **Logo Versions** page tab, and then point to the tab.

   The page tab turns gold, and a ScreenTip displays information about the page—the position of the page within the section and the date the page was created.



4. Drag the **Logo Versions** page tab to the **Work** section tab, releasing it as soon as the pointer changes to an arrow with a dotted box under it.

The Logo Versions page disappears, and the next page in the section (Groovy Girls) is visible. The Pictures section remains active.

> **Troubleshooting** If you pointed to the Work section tab until the first page of that section was displayed, simply click the Pictures section tab to reactivate it so that you can see that the page is no longer present.

5. In the notebook header, click the **Work** section tab.

   The Logo Versions page tab is at the bottom of the Page Tabs area.

6. Return to the **Pictures** section.

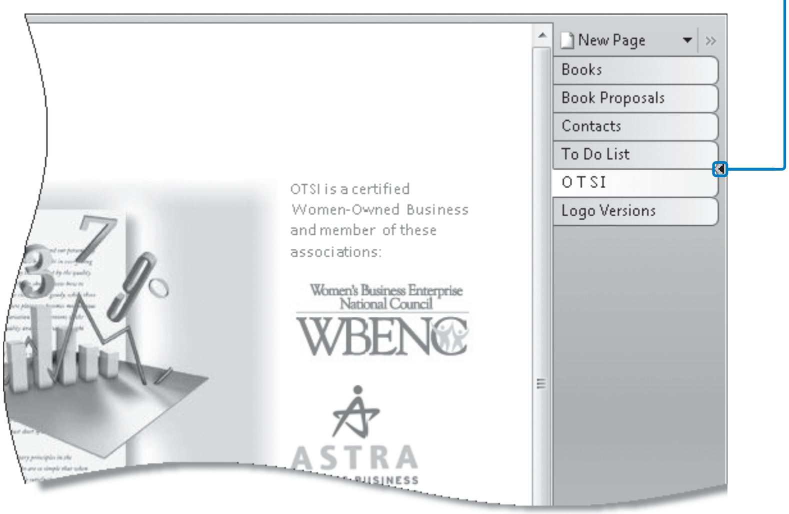
   The Groovy Girls page also belongs in the Work section, because the photos depict the company owners.

7. Drag the **Groovy Girls** page tab to the **Work** section tab, but do not release the mouse button.

   After a short pause, the Work section becomes active.

8. Continue dragging the **Groovy Girls** page to the **Page Tabs** area. Release the mouse button when the page position indicator is located between the **To Do List** and **OTSI** page tabs.

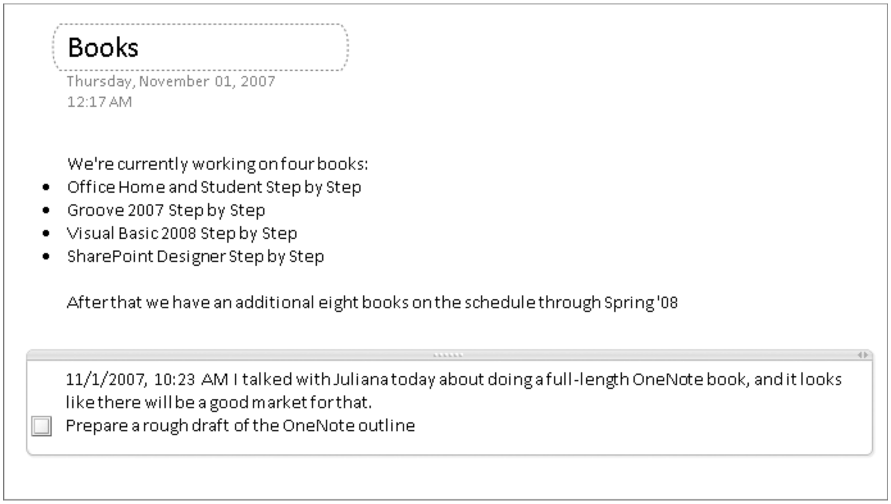
Page position indicator



The Groovy Girls page appears in the selected position but isn't displayed. The active page of the Work section remains active.

9. In the **Work** section, display the **Books** page.

   The note at the bottom of the page belongs on the To Do List page.



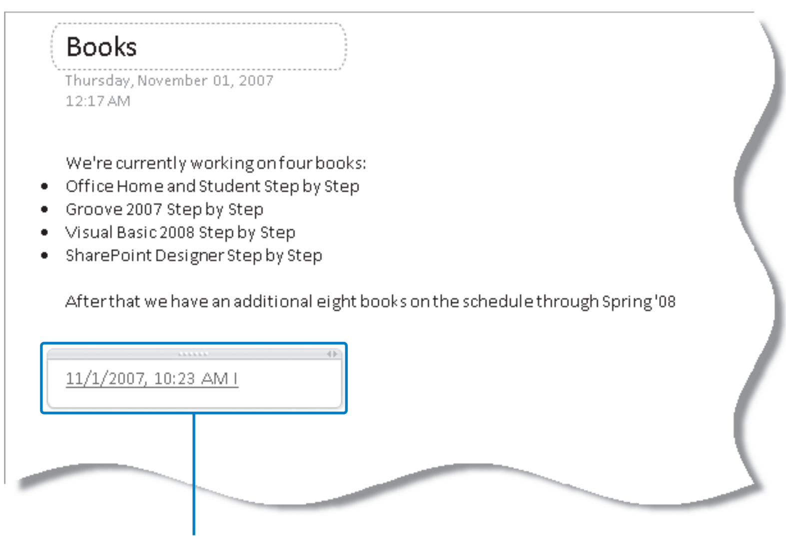
10. Right-click the note container header, and click **Cut**. Then right-click the **To Do List** page tab, and click **Paste**.

    OneNote moves the selected note to the bottom of the destination page.

    Suppose you would like to be able to jump directly to this note from the original Books page.

11. Right-click any part of the note container, and then click **Copy Hyperlink to this Paragraph**. Return to the **Books** page, right-click near the original note location, and then click **Paste**.

    A hyperlink identified by the first 20 or so characters of the link text appears.



Hyperlink to a note on another page

12. Switch to the **Pictures** section, and then display the **Fun Weekend** page.

    The page contains several photos of friends enjoying a weekend in San Diego. A few photos of San Diego Zoo residents are mixed in.

13. Scroll the page until you see the photo of two hippos underwater. If possible, position the page so you can also see the photos above and below it.

14. Point to the photo, and then select it by clicking the dashed line that appears. Then press the Del key.

    The photo disappears from the page, leaving an empty space. You could fill the space by moving each of the photos below in turn, but OneNote provides a more efficient solution.


Insert or Remove Extra Writing Space

15. On the **Insert** menu, click **Extra Writing Space**. (Or, if you have the **Writing Tools** toolbar displayed, click the **Insert or Remove Extra Writing Space** button.) Then point to the page.

    The pointer changes to a double-headed arrow, and a thick blue line appears across the page at the location of the pointer. The line moves vertically with the pointer.

16. Point near the bottom of the empty space, and drag upward.

    As you drag, a blue arrow appears in the empty space to indicate the space between the pointer and the next object on the page.

17. Release the mouse button when the vertical distance between the upper and lower pictures is what you want.

CLOSE the *SBS Moving* notebook.

Working with Multiple Instances of a Notebook

From time to time, you might need to see more than one page in the same notebook so that you can work with them at the same time. For example, you might want to work on a page in Full Page view while displaying another instance of the same notebook with the section tabs and page tabs visible, so that you can easily move around the notebook to locate references.

OneNote 2007 supports multiple concurrent sessions of a notebook. That's a fancy way of saying that you can open a second instance of the same notebook in a second OneNote program window; configure each window as you want it; and add, remove, or edit content in either window. The changes you make in one program window are reflected in the other after a short pause, or as soon as you activate the other window.

To open multiple concurrent sessions of a notebook:

➜ On the **Window** menu, click **New Window**.

The new window opens on top of the original window. You can use this technique to display two, three, or more instances of the same notebook. You can switch among the program windows by clicking the corresponding Windows taskbar buttons or by selecting the window you want from the Window menu. You can close the program windows in any order.

You can manually arrange the notebook windows on your screen, but unlike Microsoft Office Word, Microsoft Office Excel, and Microsoft Office PowerPoint, OneNote does not include a command to automatically arrange the open windows.

Tagging Notes

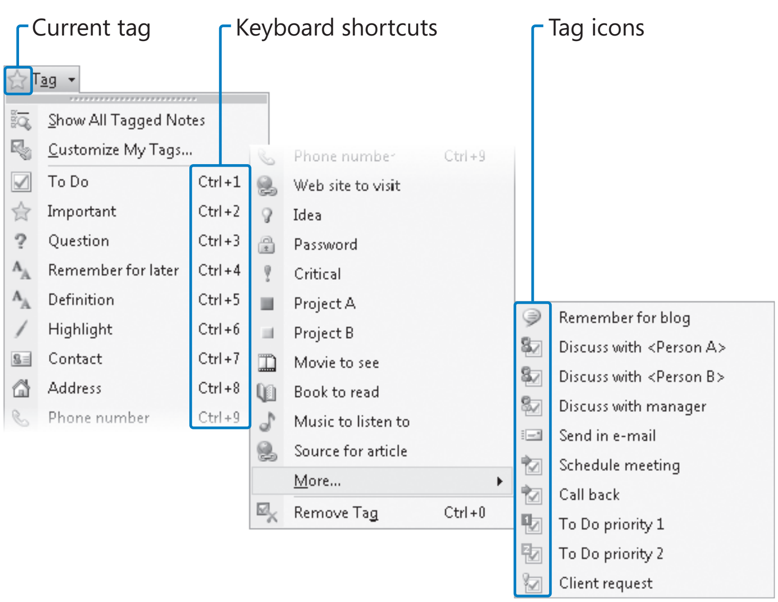
You can insert comments or other annotations about the content you collect in a notebook in several ways. For example, you can:

- Tag a note or paragraph with a built-in or custom tag.
- Insert note text on top of an image.
- Handwrite notes by using a Tablet PC pen.
- Handwrite notes by using the OneNote pen.
- Add a note to your Microsoft Office Outlook task list.

In this topic, we discuss tagging notes. OneNote tags are a convenient (and fun) feature that make it simple to assign information to a category, bring it to your attention, or mark it for later follow-up. OneNote includes 29 built-in tags, including the 9 in the following list, which have been selected by Microsoft as the most common and have been assigned keyboard shortcuts (Ctrl+1 through Ctrl+9):

- To Do
- Important
- Question
- Remember For Later
- Definition
- Highlight
- Contact
- Address
- Phone Number

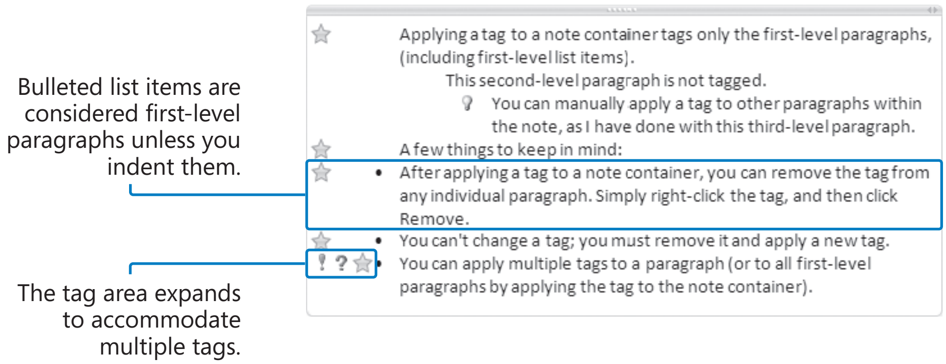
Other built-in tags you might want to use include Web Site To Visit, Idea, Password, Movie To See, Book To Read, Music To Listen To, Remember For Blog, Discuss With, Send In E-mail, and Call Back. Most tags are associated with a unique symbol that appears to the left of the tagged text. Some tags apply character formatting, paragraph formatting, or highlighting to the tagged paragraph, in addition to or instead of inserting a symbol.



Before applying a tag, you indicate how you want it applied in one of two ways:

- To tag a specific paragraph within a note, place the insertion point anywhere in the paragraph (or select it). The tag appears immediately to the left of the paragraph.
- To tag all the first-level (non-indented) paragraphs in a note, select the note container. OneNote considers bulleted items to be first-level paragraphs unless you specifically indent them. The tag appears in the left margin of the note container.

  See Also For information about paragraph levels, see the sidebar "Formatting Notes, Pages, and Sections" in Chapter 23, "Collecting Information in a Notebook."

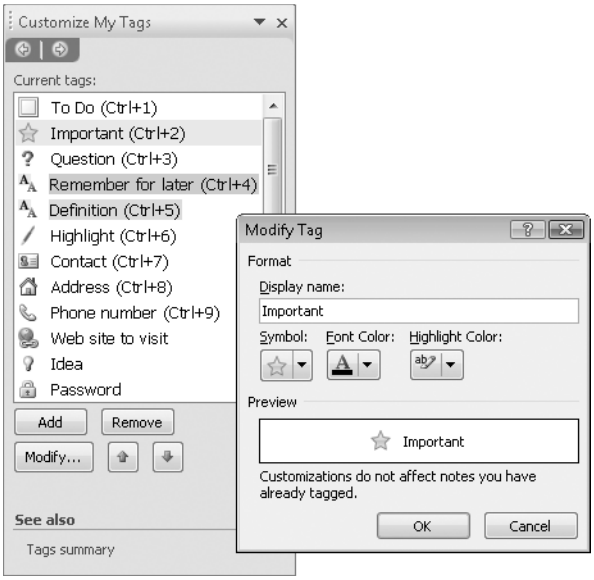


Tip You can tag text at the paragraph level only; you cannot tag specific words.

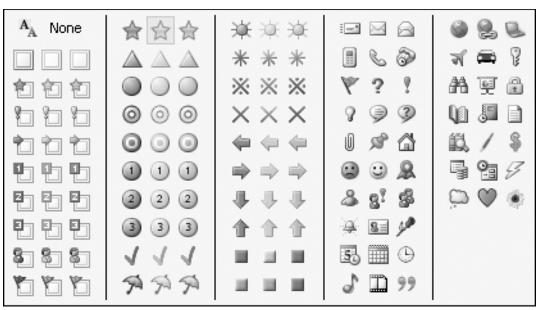
After indicating the paragraph you want to tag, you can apply the tag in several ways:

- On the Standard toolbar, click the Tag button to apply the currently selected tag (the tag used most recently).
- In the Tag list, click the tag you want to apply.
- Press one of the nine key combinations to apply the tag assigned to that combination.

You can use options in the Customize My Tags task pane to modify or delete existing tags, create your own tags, and change the order of tags on the menu. To display this task pane, click Customize My Tags on the Tag menu.



When creating or modifying a tag, you can choose from 138 symbols, 40 font colors, 15 highlight colors, or any combination of symbol, font color, and highlighting.



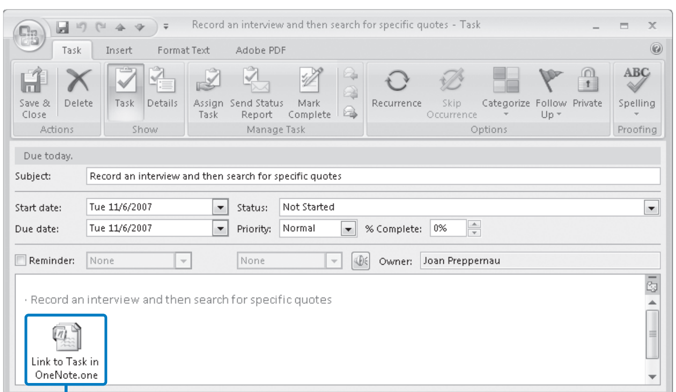
So far, tagging probably sounds fun and cool. Tags are a nice tool for bringing items on a page to your attention, keeping checklists, or other uses. But here's the real value of note tags: You can display a collated view of your notes in the Tags Summary task pane, and generate note pages containing lists of tagged notes. The first characters of the note text are visible in the list. (The number of characters depends on the width of the task pane.) You can group the notes by the type of tag, by section title, by page title, or by date, or you can list them in alphabetical order by the note text. Instead of displaying all notes from all notebooks, you can limit the results to the notes in a specific location

(active page group, active section, active section group, or active notebook) or to notes modified during a certain date range (today, yesterday, this week, last week, or older). You can't, however, limit the results to a combination of notes in a specific location and notes modified during a date range.

Synchronizing Notes with Outlook Tasks

OneNote 2007 is particularly convenient for Microsoft Office Outlook users, because it integrates tightly with Outlook tasks and messaging. Flagging a note as a task in OneNote automatically adds the task to your Outlook task list. Updating the status of a task in either place immediately and seamlessly updates it in both.

You can jump from Outlook to the notebook page associated with a flagged task. You can flag a task on any page of a notebook and return directly to that page from Outlook by clicking the Link To Task In OneNote attachment created in the task item window.



Link to the associated notebook page

When you open a notebook from the Outlook task, you can choose whether to open the entire notebook or only the relevant section.

In this exercise, you will tag notes and view your tagged notes. You will also generate a page that summarizes tagged notes.

USE the *OneNote 2007 Guide* notebook provided with OneNote 2007. This practice file is located in the *Documents\OneNote Notebooks* folder.

OPEN the *OneNote 2007 Guide* notebook.

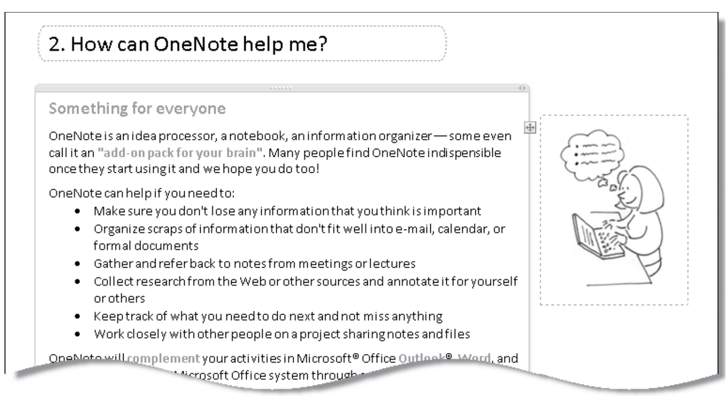
Collapse Navigation Bar

1. If the **Navigation Bar** is expanded, click the **Collapse Navigation Bar** button to maximize the size of the content pane.
2. In the **Getting Started with OneNote** section, display the page titled **2. How can OneNote help me?**
3. Point to the note text to display the note container.

   All the text is stored in one note container. Applying a tag to the container will tag all the first-level paragraphs on the page.

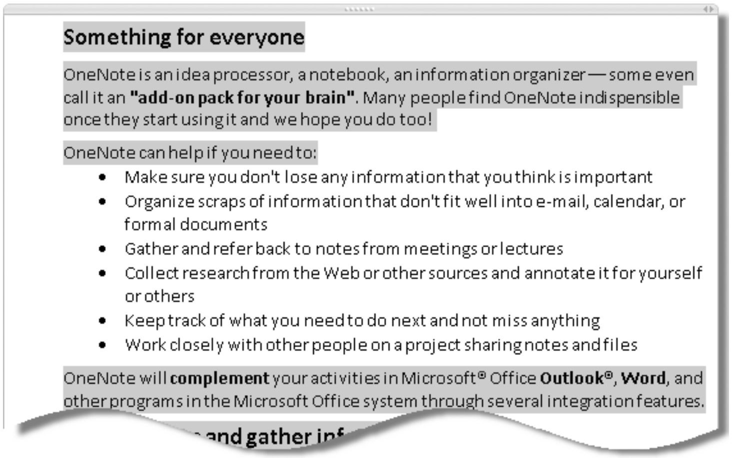
   See Also For information about splitting note containers, see "Moving and Removing Information," earlier in this chapter.
4. In turn, point to each of the graphics on the right side of the page.

   Each of the three graphics is a separate object on the page within a frame, not a note container.



5. Click the note container header to select the note content. On the **Standard** toolbar, click the **Tag** arrow, and then in the list, click **Remember for later**.
6. Click away from the note container to see the results.

Each first-level paragraph is highlighted in yellow. The Remember For Later tag applies highlighting but does not insert a tag symbol.

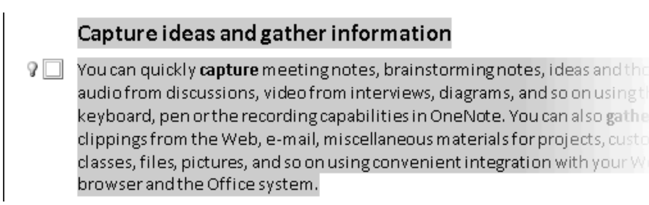


7. Click to place the insertion point anywhere in the first paragraph under the second heading (the paragraph beginning with *You can quickly capture*). Then in the **Tag** list, click **Idea**.

   A light bulb symbol appears to the left of the first line of the paragraph.

8. In the same paragraph, select the words *gather clippings from the Web*. Then in the **Tag** list, click **To Do**.

   Although the selected text occurs halfway through the paragraph, the tag symbol appears to the left of the first line of the paragraph. OneNote cannot tag specific text within a paragraph.



The To Do tag symbol in the Tag list is a check box containing a red check mark. The inserted To Do tag symbol is an empty check box. When you complete the task you have set for yourself, you can insert the check mark to indicate completion.

9. Click the **To Do** symbol.

   A red check mark appears in the check box. You can toggle check marks on and off in any of the 27 check box–based tag symbols.

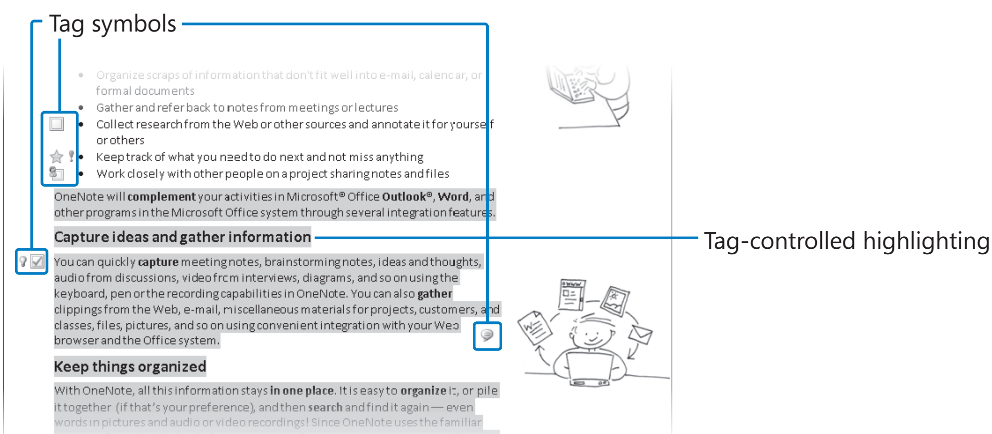
10. To the right of the tagged paragraph, point to the graphic depicting a man creating documents, pictures, and messages on his computer, and then click the dotted frame of the object.

> **Tip** If you click the graphic rather than its frame before applying a tag, OneNote inserts the tag symbol in a new note container in the location you clicked. You can enter text in the new note container, and the text rather than the graphic will appear in the Tags Summary task pane.

11. In the **Tag** list, point to **More**, and then click **Remember for blog**.

    The Remember For Blog symbol, a conversation balloon, appears to the left of the midpoint sizing handle of the graphic.

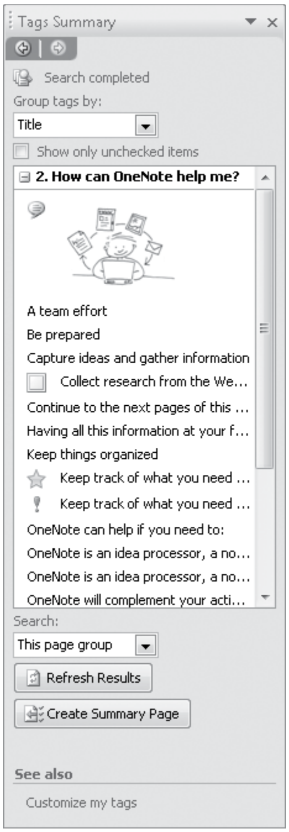
12. Use any of the methods described earlier in this topic to insert an additional five tags of your choice, anywhere on this page.



13. In the **Tag** list, click **Show All Tagged Notes**.

    The Tags Summary task pane opens, displaying the first characters of the tagged content in all the open notebooks, grouped by tag name. Tagged graphics appear in their entirety.

14. In the **Group tags by** list, click **Title** to sort the list by page title, and in the **Search** list, click **This page group**. If **2. How can OneNote help me?** does not appear at the top of the list, scroll the list to display it.



Troubleshooting Your list will vary depending on what tags you inserted.

Notice that some items in the list are preceded by tag symbols, and others are not. Those without symbols are tagged with highlighting or font color.

15. Click items in the list to jump to the corresponding notes. Then experiment on your own with different ways of grouping the tags.

16. At the bottom of the **Tags Summary** task pane, click the **Create Summary Page** button.

    A new page appears in the active section, containing the full text of the tagged content in the order that it currently appears in the Tags Summary task pane.

CLOSE the Tags Summary task pane and delete the summary page from the section.

Searching for Information

If you use OneNote as it is meant to be used, you will eventually find yourself with a large collection of information. Organizing the information by using the tools and techniques discussed in this chapter makes it easier to know where to look to retrieve stored information. However, if you know specific details about the information you're looking for, you can quickly locate it by using one of the available search and filter functions.

In the previous topic, we discussed locating tagged notes from the Tags Summary task pane. You can use the following tools to locate content that isn't tagged:

- The ***Search box*** is where you type text you know is contained in the note you are looking for. Click the Search button to generate a results list.
- The ***Search menu*** at the right end of the Search box enables you to search for written or spoken text in content within the active section, a group of sections, the active notebooks, or all notebooks. OneNote will locate the search text in handwritten, typed, or scanned content, or in an audio or video file.
- The Page List task pane displays a list of notebook pages containing the search results. These results are ordered by the date on which you last changed any information on the page, by section, or by page title. You can limit the results to pages in a specific location (active section, active section group, active notebook) or search all notebooks.

When you are looking for information you have stored in your notebook, you can search not only the text of the notes, but also the text of images. For example, if you store scanned business card images in OneNote, a search for a name, company name, address, or other information on the business card will locate the scanned image. OneNote 2007 supports image text search in English, French, and Spanish. You can change the search text language of an individual image by right-clicking the image, pointing to Make Text In Image Searchable, and then clicking the text search language. You can also disable text search for a specific language from this menu.

Here's a fun experiment to try:

1. Using your digital camera or mobile phone, take a photo of a business card (or other printed item).
2. Transfer the photo to your computer, by copying it or sending it in an e-mail message.
3. Insert the photo into OneNote.


Search

4. Enter text displayed in the photo into the **Search** box, and then click the **Search** button.

OneNote 2007 includes an Audio Search feature that you can use to search for spoken text in good-quality audio and video recordings. Audio Search is not available by default; you must specifically enable it.

To enable Audio Search:

1. On the **Tools** menu, click **Options**.
2. In the **Options** window, display the **Audio and Video** page.
3. Under **Audio Search**, select the **Enable searching audio and video recordings for words** check box.

   The Did You Know About Audio Search window opens.

4. Click the **Enable Audio Search** button, and then in the **Options** window, click **OK**.

   OneNote indexes the audio and video recordings while you're not using your computer; the indexing process is somewhat slow, so you won't be able to search for spoken words immediately.

See Also For more information about searching for content in spoken text, see the Audio Search page in the More Cool Features section of the *OneNote 2007 Guide* notebook.

Tip Microsoft recommends a 2 gigahertz (GHz) or higher processor and 1 gigabyte (GB) or higher of RAM for the OneNote Audio Search feature.

The *OneNote 2007 Guide* notebook that comes with OneNote 2007 includes many different types of content that you can search. To practice, open the *OneNote 2007 Guide* notebook, display the page titled 6. Search Your Notes in the Getting Started With OneNote section, and follow the Try It Now steps.

CLOSE any open notebooks, and exit OneNote.

Key Points

- You can move notes on a page, pages within and between sections, and sections between notebooks.
- When you delete a note from a page, the content that follows the note on the page does not move up to fill the empty space.
- You can use the Insert Or Remove Extra Writing Space tool to decrease or increase the space between notes, or to split one note into two.
- OneNote will generate a hyperlink to a note, page, section, or notebook that you can paste onto a page. The hyperlink displays the first 20 or so characters of the target notebook or section name, page title, or note text.
- You can open a second instance of a notebook in a separate OneNote program window, configure each window as you want it, and edit content in either window.
- You can assign one or more tags to any paragraph or object on a page. In the Tags Summary task pane, you can display a collated list of tags by location or date, and generate a summary page of selected tags.
- OneNote 2007 integrates with Outlook 2007. Flagging a note in OneNote creates an Outlook task that is editable from either program.
- You can search text, images, and audio recordings for specific text and display a list of search results ordered by section, title, or date.

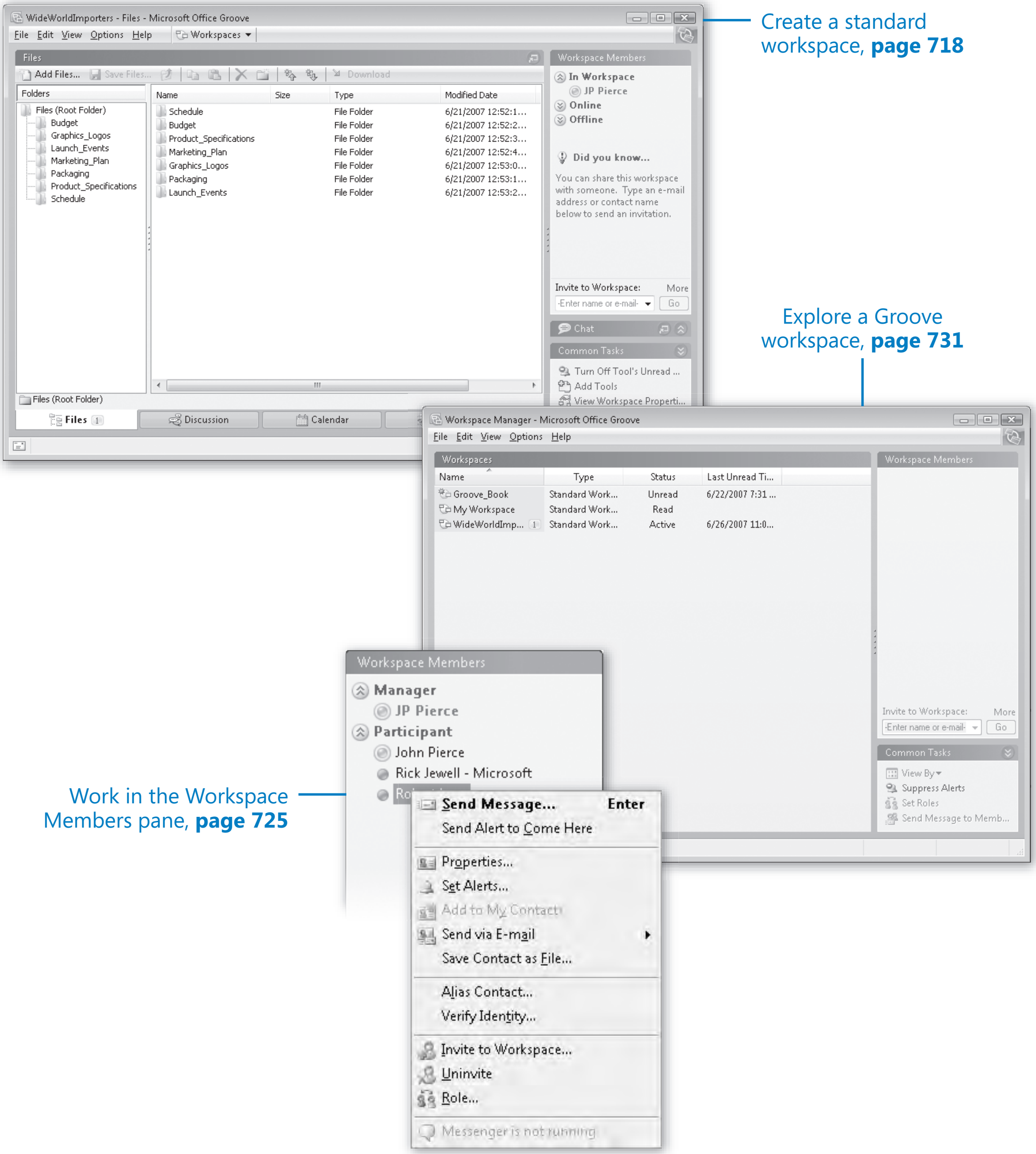
Part VIII

Microsoft Office Groove 2007

Chapter at a Glance

Create a standard workspace, **page 718**

Explore a Groove workspace, **page 731**



Work in the Workspace Members pane, **page 725**

25 Setting Up a Standard Workspace

In this chapter, you will learn to:

- ✔ Create a standard workspace.
- ✔ Send and accept workspace invitations.
- ✔ Work in the Workspace Members pane.
- ✔ Change the role of a workspace member.
- ✔ Change permissions assigned to a workspace role.
- ✔ Explore a Groove workspace.
- ✔ Add files to the Files tool.
- ✔ Add a tool to a standard workspace.

Microsoft Office Groove 2007 is a desktop collaboration application. What makes Groove effective is how its features work together. Most often in your work with Groove, you will use a combination of features rather than one feature to communicate, facilitate team discussions, or capture information in shared files and documents. A Groove standard workspace, which you will learn about in this chapter, is an example of how Groove brings its features together.

In many ways, workspaces are at the center of the capabilities that Groove provides. Workspaces have members, who might be a group of people involved in a project or the employees who work in a certain department within a company—the finance or marketing department, for example. Workspaces also include tools and other features that members use in their work together. You can initiate an instant message from a workspace, for example, store documents and meeting notes, or hold an online chat. Each member of a workspace is assigned a role, and each workspace role has permission to perform certain tasks. You can modify these permissions when you need to, and you can also change the role to which a member is assigned.

After you enter a workspace, you work with the Groove ***Workspace Explorer***. The Workspace Explorer provides access to workspace tools (the Files tool, the Discussion tool, and others that you add to the workspace) as well as to commands that you use to invite people to join a workspace, send messages to workspace members, manage workspace properties, and change how you view the information that a workspace contains. The Workspace Explorer ties into and builds on the work that you perform from the Groove Launchbar.

In this chapter, you'll learn how to create a standard Groove workspace, how to invite and manage workspace members, how to view workspace properties and the information the workspace contains, and how to start building the workspace by adding tools and files.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Troubleshooting Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Creating a Standard Workspace

A standard Groove workspace offers a set of tools and features that members of the workspace use to stay in touch, maintain the information that they share, and make decisions about issues that affect the work they do together. Groove also provides a type of workspace known as a *file sharing* workspace, which is a workspace designed for sharing files among computers and its members and keeping the files synchronized. A file sharing workspace does not provide the set of tools that a standard workspace does.

See Also For more information about setting up and using a Groove file sharing workspace, see Chapter 26, "Managing and Sharing Files."

You can create a workspace by using one of the following methods:

- **A default standard workspace** provides a Files tool for storing shared files and a Discussion tool for holding and capturing information from online discussions.
- **A custom workspace** lets you select from a set of tools, including the Files tool, the Discussion tool, and tools you use for organizing and managing meetings, tracking issues, storing images, and other needs.
- **A workspace template** includes a set of tools defined for the template and can also include files and a list of default members that are associated with the template's purpose. For example, you might define a workspace template for projects that would include the workspace tools your project teams require; standard files that project teams use to create budgets, schedules, status reports, specifications, and similar information; and team managers who oversee each project as default members.

To create and start setting up a standard workspace in Groove, you can use the New Workspace link at the top of the Workspace tab on the Launchbar. You enter a name and specify the type of workspace you are creating, and you select a workspace template if required.

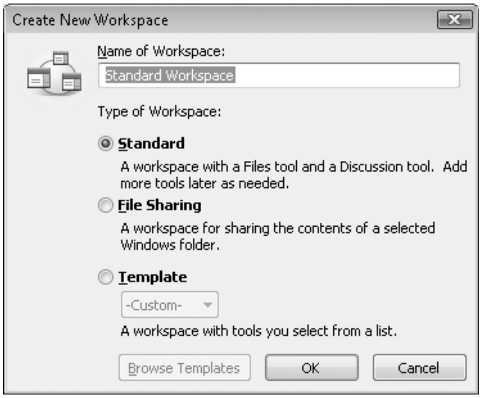
In this exercise, you will create a default standard workspace and a standard workspace from a template. The workspace template is designed for the Wide World Importers marketing department to coordinate new product launches. The default standard workspace will be featured in exercises in which you work with multiple workspaces.

USE the *WideWorldImporters.gsa* file. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\GrooveWorkspace* folder.

BE SURE TO log on to Groove before beginning this exercise.

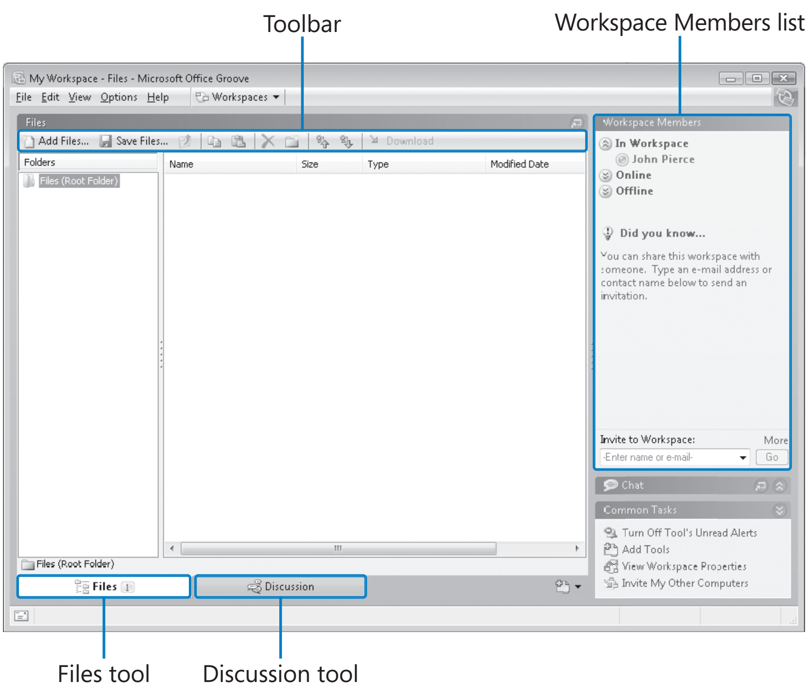
1. On the **Launchbar**, click **New Workspace**.

The Create New Workspace dialog box opens. The Standard option is selected by default.



2. In the **Name of Workspace** text box, enter **My Workspace**, and then click **OK**.

The Groove Workspace Explorer opens and displays the new standard workspace. The workspace includes a Files tool and a Discussion tool by default. Tabs for these tools are included at the bottom of the Workspace Explorer window. The Workspace Members list is displayed to the right of the window. You should see your name (or the name you've assigned as a Groove identity) displayed in this list.



> **Tip** To rename a workspace, right-click the workspace in the Launchbar, and then click Rename. Enter a new name for the workspace, and then click OK.

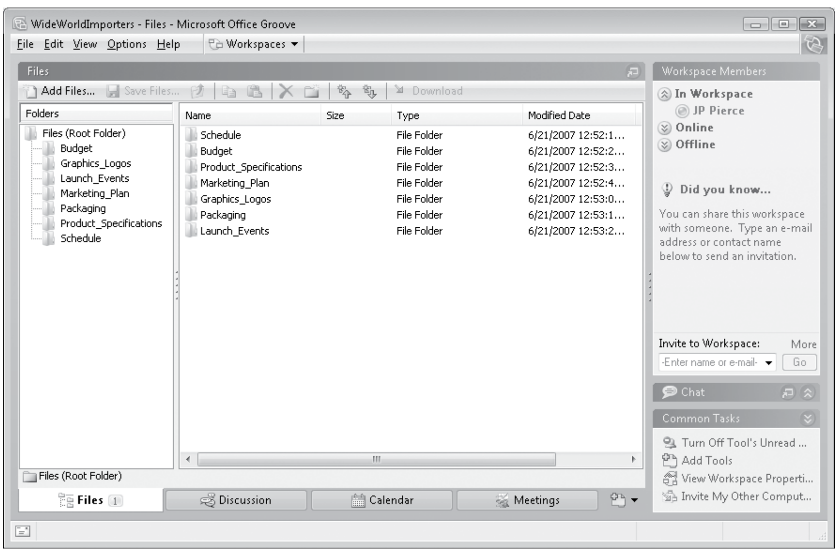
3. In the **Workspace Explorer**, on the **File** menu, point to **New**, point to **Workspace From,** and then click **Template**.

   The Browse dialog box opens.

4. Navigate to the *Documents\Microsoft Press\2007OfficeSBS\GrooveWorkspace* folder.

5. Select the *WideWorldImporters.gsa* file, and then click **Open**.

   The Groove Workspace Explorer opens and displays the WideWorldImporters workspace and the folders it contains in its Files tool. Tabs for the other workspace tools defined for the template appear at the bottom of the Workspace Explorer window. The WideWorldImporters workspace template includes a Calendar tool and a Meetings tool in addition to the Files and Discussion tools that are included by default in a Groove standard workspace.



See Also For more information about tools, see "Adding a Tool to a Standard Workspace" later in this chapter.

CLOSE the My Workspace workspace, but do not close the WideWorldImporters workspace.

Sending and Accepting Workspace Invitations

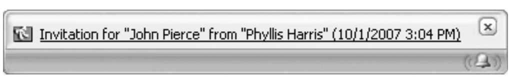
The person who creates a workspace becomes a member of that workspace automatically. He or she is the person who then invites co-workers and other people to become members of the workspace. Workspace invitations are sent as a Groove instant message to people who are among your Groove contacts, or as e-mail messages to a person who is not one of your known Groove contacts.

Each workspace member is assigned one of three ***roles***. The individual who creates the workspace is assigned the ***Manager*** role by default. When you prepare an invitation to a workspace, you specify which role each person you invite will have when he or she joins the workspace. The person sending invitations can assign the Manager role to other people or specify the ***Participant*** or ***Guest*** role.

See Also Workspace managers can assign a member to a different role after the member has joined the workspace. Managers can also change the permissions associated with a specific role. For more information about workspace roles, see the topics later in this chapter.

Follow these steps to accept an invitation to a Groove standard workspace:

1. In the notification area of the taskbar, click the Groove alert indicating that you have received an invitation.



2. In the **Respond to Invitation** dialog box that opens, click **Accept**, and then click **OK** in the **Invitation Acceptance Tip** window.

   In the Workspace Explorer window, your standard Groove account name should now be listed as a member.

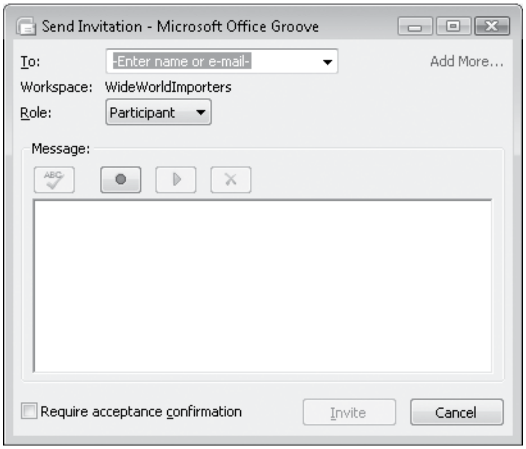
In this exercise, you will send an invitation to join a workspace.

> **Important** You will send the invitation to a Groove account that was set up for this book. This account is for illustration purposes only and cannot accept the workspace invitation or become a member of the workspace.

USE the WideWorldImporters workspace you created in the previous exercise.
OPEN the WideWorldImporters workspace if it isn't already open.

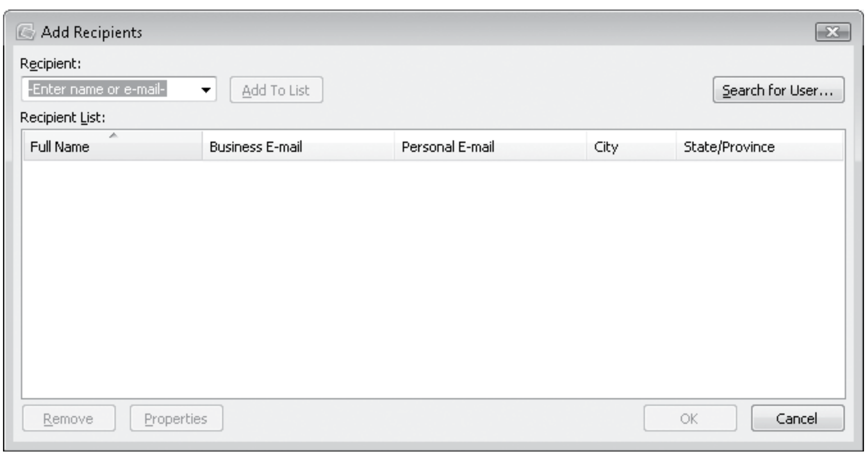
1. In the **Workspace Explorer**, on the **Options** menu, click **Invite to Workspace**.

   The Send Invitation dialog box opens.



2. In the upper-right corner of the **Send Invitation** dialog box, click the **Add More** link.

   The Add Recipients dialog box opens.

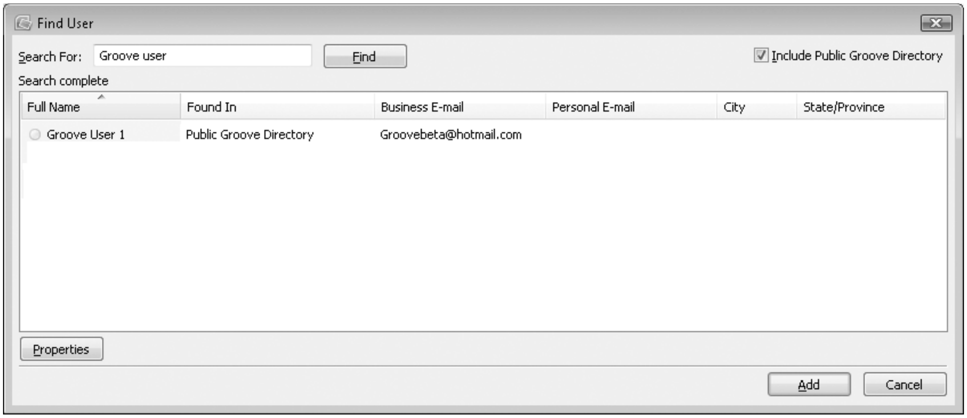


3. In the **Add Recipients** dialog box, click **Search for User**.

   The Find User dialog box opens.

4. In the **Search For** box, type Groove user.
5. Select the **Include Public Groove Directory** check box, and then click **Find**.

   The Find User dialog box displays a list of Groove accounts that match the text you searched for.



> **Tip** You might see additional Groove accounts with similar names in the Find User dialog box.

6. Select the user **Groove User 1**, and then click **Add.**
7. In the **Add Recipients** dialog box, click **OK**.
8. In the **Send Invitation** dialog box, in the **Message** area, type Please join the workspace.
9. At the bottom of the **Send Invitation** dialog box, select the **Require acceptance confirmation** check box.

> **Tip** By selecting the Require Acceptance Confirmation check box, you will see an alert that notifies you that an invitee has accepted the invitation. You will then be asked to confirm the members' acceptance.

10. Click **Invite**. In the **Invitation Tip** message window, click **OK**.

Inviting Someone Who Does Not Have Groove to Join a Groove Workspace

When you send a workspace invitation to an e-mail address—generally, to someone who is not among your Groove contacts—Groove sends the invitation by using Microsoft Office Outlook. The e-mail message contains an attachment with the invitation and a link that people who don't have Groove installed can use to open a Groove download page. After the invitee installs and opens Groove, the invitation should open automatically, or the invitee can open the e-mail message and open the invitation attachment to respond.

Working in the Workspace Members Pane

The Workspace Members pane in the Workspace Explorer provides information about workspace members. For example, member names are displayed in different colors to indicate whether you have verified the identity of the member.

The list of workspace member names also shows the online or offline status of each member. The status of a workspace member can be one of the following. Some of the categories listed appear only when a member has that status:

- **In Workspace**. Indicates members who currently have the workspace open.
- **Navigating Together.** Indicates members who currently have the workspace open and have enabled the Navigate Together option.
- **Online.** Indicates members who are currently online but don't have the active workspace open.
- **Idle.** Lists members who are currently online but have not done activities at their computer for at least the past 15 minutes.
- **Offline.** Indicates members who are currently offline.
- **Suspended.** Indicates members whose workspace data is no longer being synchronized.

Tip A clock indicator means that the member has not done any computer activities for at least 15 minutes. You can point to the clock indicator to see the exact period of time the member has been idle.

You can also use the Workspace Members pane to initiate activities with other members of a workspace. For example, you can right-click a member's name, click Properties, and then open the member's contact card to send a message to that member. You can right-click one or more names to display a menu of Groove activities. For example, you can select several members, right-click, and then click an option to send an instant message or an invitation to a new workspace.

You can organize your view of workspace members in several different ways:

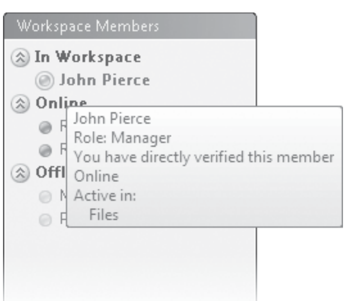
- **Alphabetical.** Shows member names in alphabetical order by their first name. (Your name will appear first in the list.)
- **Status.** Categorizes members according to their current status.
- **Verification Status.** Categorizes members according to their contact authentication status.
- **Role.** Categorizes members according to their role in the workspace.
- **Organization.** Categorizes members by the organization listed in their contact properties. If members have no organization listed in contact properties, they are listed under "Unknown Organization."

In this exercise, you will view and organize the list of workspace members, and initiate actions with workspace members from the list.

USE the WideWorldImporters workspace you created earlier in this chapter.
OPEN the WideWorldImporters workspace if it isn't already open.

1. In the **Workspace Members** list, point to your name or to another member's name.

   A status window displays information; for example, the member's role in the workspace and what tool the member is using.

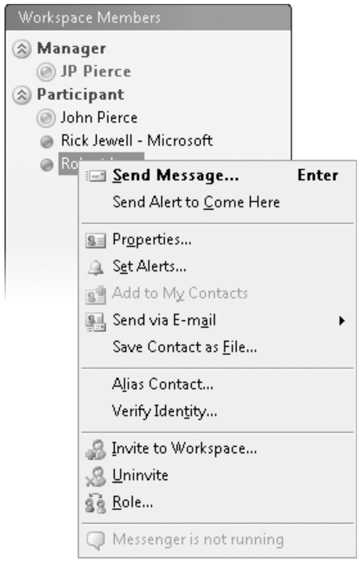


2. In the **Workspace Explorer**, on the **View** menu, point to **View Members By**, and then click **Role**.

   The list of member names is now organized by role rather than by status.

3. In the **Workspace Members** list, right-click the name of another member.

   A shortcut menu appears.



   You can use this menu to initiate actions with workspace members. You can send an instant message, for example, or send an alert that a member is needed in a workspace. You can also view a member's properties, change a member's workspace role, and verify a member's identity.

> **Tip** To show or hide the Workspace Members list, on the View menu, point to Show/Hide, and then click Members. When you are working in the Workspace Members list, you can expand and collapse member categories, the Chat tool, or the Common Tasks area. If you hide the Workspace Members list, you also hide the Chat tool and the Common Tasks area.

Navigating Together

With the Groove Navigate Together option, workspace members can move in unison from one workspace tool to another. If you have a friend or colleague who is also using Groove, you can try out this feature.

To activate this feature, click Navigate Together on the Options menu in the Workspace Explorer. Only members who have Navigate Together selected during the same time navigate together. In other words, if other members have this option selected when you select it, you immediately navigate to their location in the workspace. If members who are navigating together are working in the Discussion tool, you will be taken to this tool as well. Navigate Together remains in effect until you clear the option from the Options menu or close the Workspace Explorer. Navigate Together works with actions such as opening or closing the Groove Chat pane, opening folders in a Files tool, or navigating in the Calendar tool.

To navigate on your own while Navigate Together is turned on, press Shift while clicking. You might decide to do this if you want to work briefly with a different tool on your own.

Changing the Role of a Workspace Member

The role assigned to a workspace member controls which actions the member can perform. A member assigned to the Manager role, for example, can add and delete tools from a workspace, invite or uninvite members, or cancel invitations that have not yet been acted on. A member with the Participant role can add tools to a workspace but cannot delete tools. A member assigned to the Guest role can view files in a workspace but cannot send invitations, add tools, or perform other workspace operations. The Guest role should be used for members who need to review the workspace from time to time to check on progress and status but who are not actively engaged in the proceedings or project the workspace supports.

The following table lists the default permissions for each workspace role.

Managers	Invite and uninvite members. Add or delete tools. Cancel outstanding invitations.
Participants	Invite members. Add tools.
Guests	No permissions.

See Also Each workspace role also comes with a set of permissions related to their use of specific workspace tools. For an example of how to set permissions for a specific tool, see "Setting Permissions in the Files Tool," in Chapter 26, "Managing and Sharing Files."

A member who is assigned the Participant or Guest role when the workspace is first set up, however, might take on more responsibilities for a project or a group later. A member who has the Participant role might need to be made a Manager, even temporarily, or a member who is a Guest might be given the role of a Participant so that the member can work more actively in the workspace. Part of managing a workspace and its members is changing the role of a member from time to time after he or she accepts an invitation to the workspace. Only members who have the Manager role can reassign roles for other members.

In this exercise, you will set a workspace member's role.

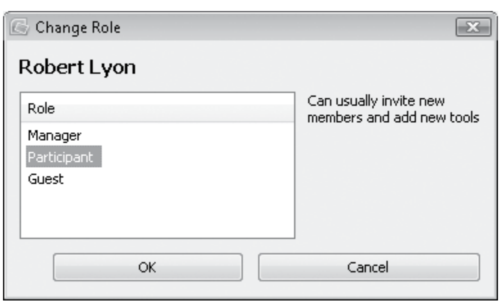
USE the WideWorldImporters workspace you created earlier in this chapter.
OPEN the WideWorldImporters workspace if it isn't already open.

1. In the **Workspace Explorer**, on the **Options** menu, click **Set Roles**.

   The Properties dialog box opens.

2. Click the name of the user whose role you want to change, and then click **Change Role**.

   The Change Role dialog box opens.

3. Click the new role, and then click **OK**.
4. In the **Properties** dialog box, click **OK**.

Changing Permissions Assigned to a Workspace Role

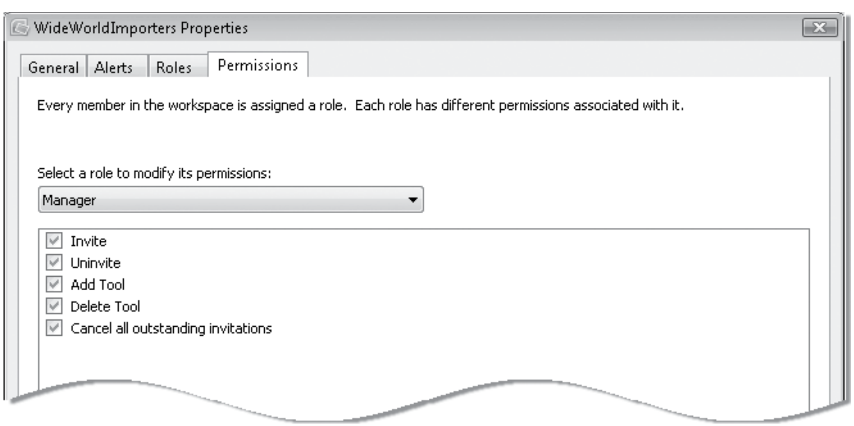
Each workspace role—Manager, Participant, and Guest—is defined by the tasks that the role is permitted to perform. Workspace members assigned to the Manager or Participant role, for example, can invite other people to join the workspace. A member with the Guest role cannot.

In most workspaces, the default permissions for each role will enable members to perform their work efficiently. In other cases, however, you might have reason to change the permissions associated with a specific role. For example, you might want to allow members assigned to the Guest role to send invitations. Rather than change the role that is assigned to these members, you can adjust the permissions that are granted to a specific role. Only individuals who are workspace managers can make changes to the permissions for a workspace role.

In this exercise, you will change the permissions for a workspace role.

USE the WideWorldImporters workspace you created earlier in this chapter.
OPEN the WideWorldImporters workspace if it isn't already open.

1. In the **Workspace Explorer**, on the **Options** menu, click **Set Roles**.
2. In the **WideWorldImporters Properties** dialog box, click the **Permissions** tab.



3. On the **Permissions** tab, in the **Select a role to modify its permissions** list, click **Guest**.
4. Select the **Invite** check box, and then click **OK**.

CLOSE the WideWorldImporters workspace.

Tip To remove a permission from a role—for example, to prevent Participants from adding tools—follow the previous steps and then clear the check box for that specific permission.

Exploring a Groove Workspace

A standard Groove workspace includes a Files tool and a Discussion tool. In the Workspace Explorer, current workspace members are listed in the Workspace Members pane, the Chat tool is available, and you're provided with links to common tasks.

As the number of workspaces you belong to increases, you will need to switch from one workspace to another in the Workspace Explorer and organize the view of your workspaces. The Workspace Explorer provides several ways by which you can navigate between and organize workspaces.

You can, for example, view your workspaces by status (Active, Unread, Read) or by Last Unread Time. In this view, you can see which of your workspaces has unread data as of last week, the last thirty days, and other categories. Workspaces that have not received updates for more than thirty days are categorized under Older. Within each of these categories, workspaces are sorted in descending order of most recently read. In addition to Status and Last Unread time, you can view workspaces as follows:

- **Folders.** Sorts workspaces by folder.
- **Alphabetical.** Lists workspaces in alphabetical order.
- **Not On This Computer.** Indicates workspaces you have on other computers. You can download the workspace data either from another computer that contains your account or from another workspace member.
- **Type.** Sorts workspaces by type, such as Standard Workspace or File Sharing Workspace.

On the Workspace Explorer toolbar, for example, you can display the Workspace Selector, a drop-down menu that appears in the toolbar. You can reposition the Workspace Selector by dragging it to a different location on the toolbar. You can also display the Workspace List to help you navigate between workspaces. Both the Workspace List and the Workspace Selector display all the workspaces in your account that you can open in the tool area. By pointing to the name of a workspace, you can display a status window that lists the last modified date and members who are currently in the workspace.

You should become familiar as well with the Workspace Manager. The Workspace Manager is another means of viewing your workspaces. You can see the name, status, type, and time when you last had unread information in the workspace. When you select a workspace name in the list, the Workspace Members pane shows which members are active in the workspace and which members are online or offline.

> **Tip** You can create a desktop shortcut to open a workspace you work with often. On the Launchbar, right-click the workspace, and then click Save Shortcut To Desktop.

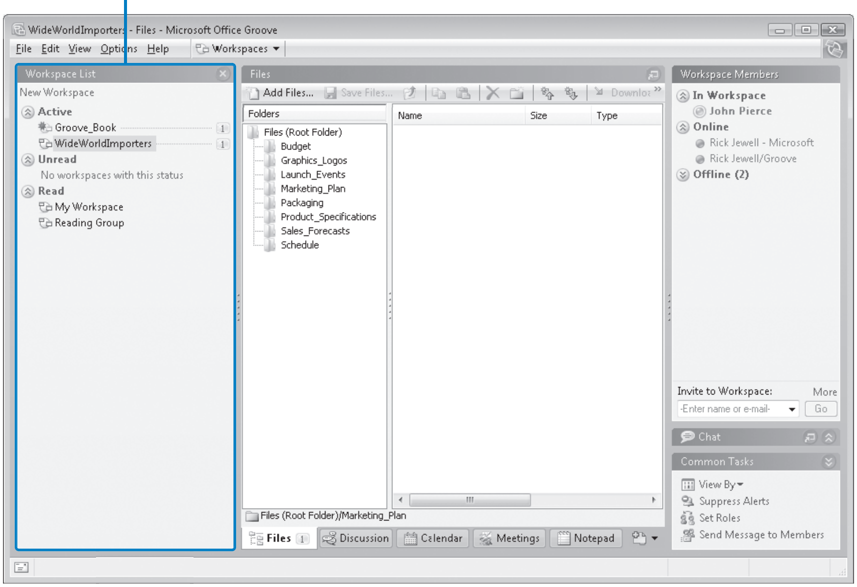
In this exercise, you will manage your views of workspaces and switch from one workspace to another.

> **USE** the My Workspace workspace you created earlier in this chapter.
> **OPEN** the My Workspace workspace.

1. In the **Workspace Explorer**, on the **View** menu, point to **Show/Hide**, and then click **Workspace List**.

   The Workspace List is displayed and lists the workspaces in categories based on workspace status: Active, Unread, and Read.

Workspace List



2. In the **Workspace List,** point to the **WideWorldImporters** workspace to view a summary of its status.

The status shows, among other information, the names of the workspace members who are active in the workspace and the type of workspace.

3. On the **View** menu, point to **View Workspaces By**, and then click **Last Unread Time**.

   The workspaces are listed in descending order of which workspaces have been read most recently.

4. On the **View** menu, point to **Show/Hide**, and then click **Tools in Workspace List**.

   The Workspace List now displays a list of the tools that are included in each workspace.

5. In the **Workspace List**, click the plus sign (+) to the left of WideWorldImporters to show the tools included in this workspace.

   You can now click the name of a specific tool in the Workspace List to make that tool active in the workspace.

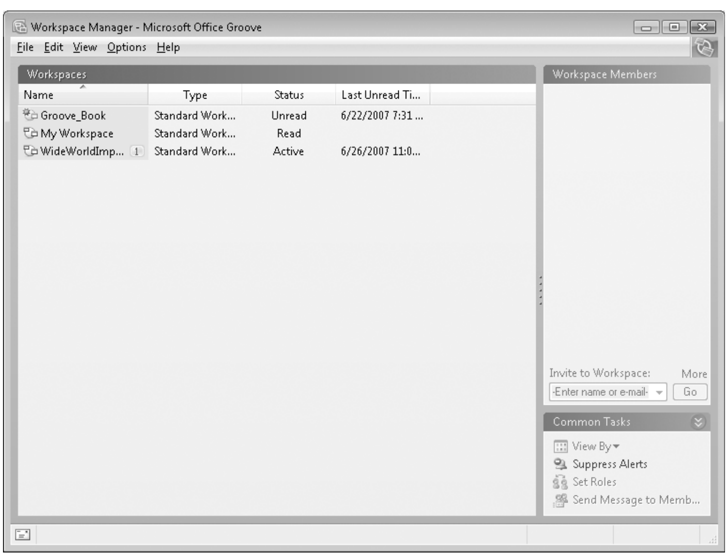
6. On the **View** menu, point to **Toolbars**, and then click **Back and Forward**.

   You can use the Back and Forward buttons that are added to the toolbar to retrace your steps as you move from one workspace and tool to another.

> **Tip** To hide or display the Workspace Selector, point to Toolbars on the View menu, and then click Explorer Toolbar.

7. On the **Options** menu, click **Workspace Manager**.

   The Workspace Manager lists the name, type, status, and last unread time of each workspace for which you are a member. You can sort the list of workspaces by a column heading by clicking the heading.



8. In the **Name** column of the Workspace Manager, click **WideWorldImporters**.

   In the Workspace Members pane, the members of the workspace are listed.

   > **Tip** You can send an instant message or initiate other actions with workspace members by right-clicking a member's name and choosing the action you want from the shortcut menu.

9. In the **Workspace Manager**, on the **File** menu, click **Close Window**.
10. In the **Workspace Explorer**, on the **View** menu, point to **Show/Hide**, and then click **Workspace List**.

CLOSE the My Workspace workspace.

Viewing General Workspace Properties

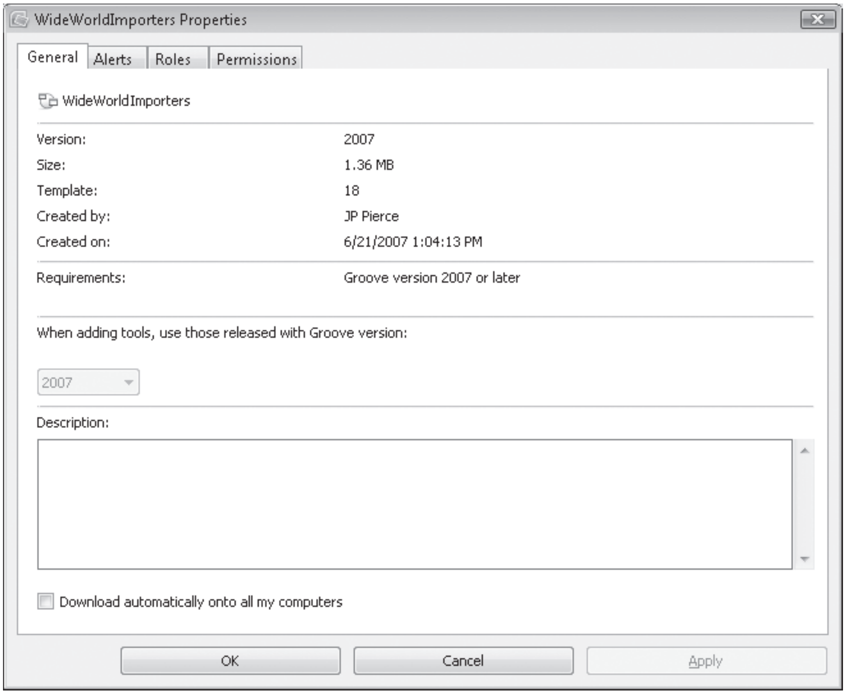
Like workspace members, workspaces themselves have properties. Workspace properties include the following:

- The version of Groove you are using
- The size of the workspace
- The template on which the workspace is based
- The individual who created the workspace
- The time and date when the workspace was created
- Software requirements for using the workspace
- The version of Groove with which the tools added to the workspace should be associated
- A description of the workspace
- An option to download the workspace automatically on all computers on which you use Groove

Tip For best performance, Microsoft recommends that the size of any workspace not exceed 2 gigabytes (GB). (You can view workspace properties to see the current workspace size.) Groove cannot send a workspace that exceeds 2 GB to new invitees.

To view workspace properties:

➜ In the **Workspace Explorer**, on the **File** menu, point to **Properties**, and then click **Workspace.**



See Also For information about property settings for roles and permissions, see the topics earlier in this chapter.

Adding Files to the Files Tool

As mentioned earlier, the Files tool is one of the tools provided by default in a standard workspace. You can use the Files tool to collect and store files that members share, making the files available to members in a location to which each member has access. For example, teams that work together without a tool such as Groove often route files for review through e-mail, which often has the effect of creating more than one “master” copy of the files. In Groove, after a workspace member adds a file to a workspace, Groove alerts members that the workspace contains “unread” data. In a similar manner, when a workspace member makes a change to a file contained in a workspace, Groove synchronizes the file, and workspace members are notified that the file has changed.

See Also For detailed information about using the Files tool, see Chapter 26, “Managing and Sharing Files.”

In this exercise, you will add files to a Files tool in a standard workspace.

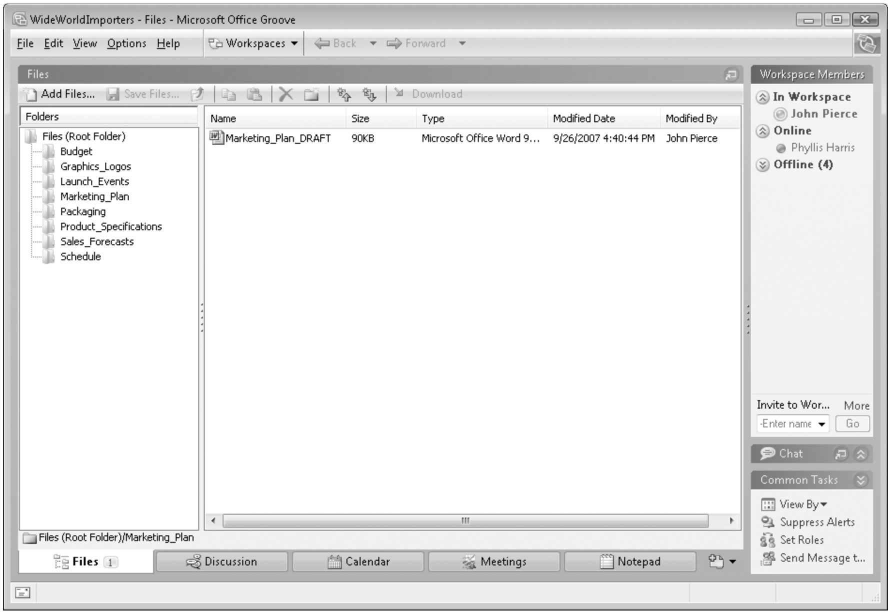
USE the WideWorldImporters workspace you created earlier in this chapter. Also use the *Marketing_Plan_DRAFT* document. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\GrooveWorkspace* folder.

OPEN the WideWorldImporters workspace.

1. In the **Workspace Explorer**, click the **Files** tab.
2. In the **Folders** list, click **Marketing_Plan**, and then, on the toolbar, click **Add Files**.

   The Add Files dialog box opens.
3. In the **Add Files** dialog box, navigate to the *Documents\Microsoft Press\2007OfficeSBS\GrooveWorkspace* folder.
4. Click the *Marketing_Plan_DRAFT* document, and then click **Open**.

   The file now appears in the Files tool.



Adding a Tool to a Standard Workspace

Members of a workspace such as the WideWorldImporters workspace need to keep track of and resolve issues, coordinate tasks, report on their progress, and exchange and evaluate ideas. While some members work on tasks that help resolve issues, other members are creating and updating documents and related information. Although tools such as e-mail, file shares on servers and shared computers, Web sites, and even specialized collaboration applications support particular tasks and processes, they don't always support consistent data access or provide the context and information about daily activities that a team needs. That's where Groove workspace tools come into play.

A standard workspace, in addition to the Files tool and Discussion tool that the workspace provides by default, can include tools that support project planning, help organize meetings, track dates, let you take notes or create illustrations, and design forms for collecting specialized data. After you set up a standard workspace, you can add the tools you need for the type of work you plan to do in the workspace, and then add other tools as the activities and information in the workspace develop.

Workspace tools are organized on tabs at the bottom of the Workspace Explorer window. Clicking a tool's tab makes the tool active. The number that appears beside a tool tabs tells you how many workspace members are working with that tool.

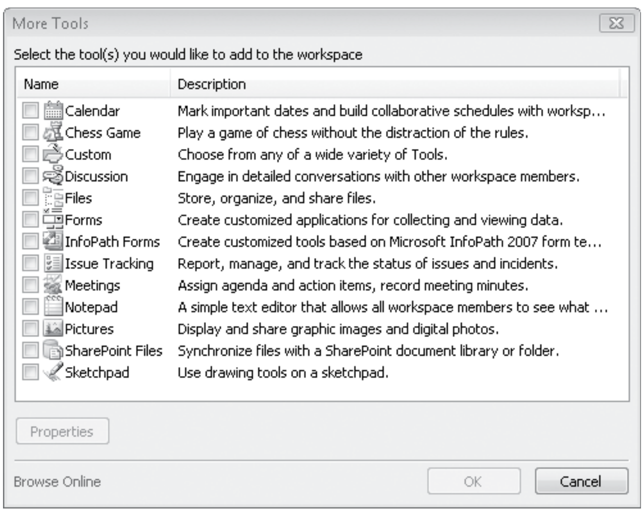
> **Tip** You can drag tool tabs to change their position in the workspace.

In this exercise, you will add a tool to a workspace.

> **USE** the WideWorldImporters workspace you modified in the previous exercise.
> **OPEN** the WideWorldImporters workspace if it isn't already open.

1. In the **Workspace Members** pane, in the **Common Tasks** area, click **Add Tools**.

   The More Tools dialog box opens, displaying a list of tools that you can add to the workspace.



2. In the **More Tools** dialog box, select the **Notepad** check box, and then click **OK**.

   The workspace now includes a Notepad tool, which is the active tool.

> **CLOSE** the Workspace Explorer. If you are not continuing directly to the next chapter, exit Groove.

> **Tip** A workspace can include more than one copy of a tool of the same type. For example, you can add more than one Notepad tool to a workspace and use one for meeting notes and another for draft reports. You can rename a workspace tool to identify its particular function by right-clicking the tool's tab, clicking Rename on the shortcut menu, and then entering the name you want to use in the Rename Tool dialog box.

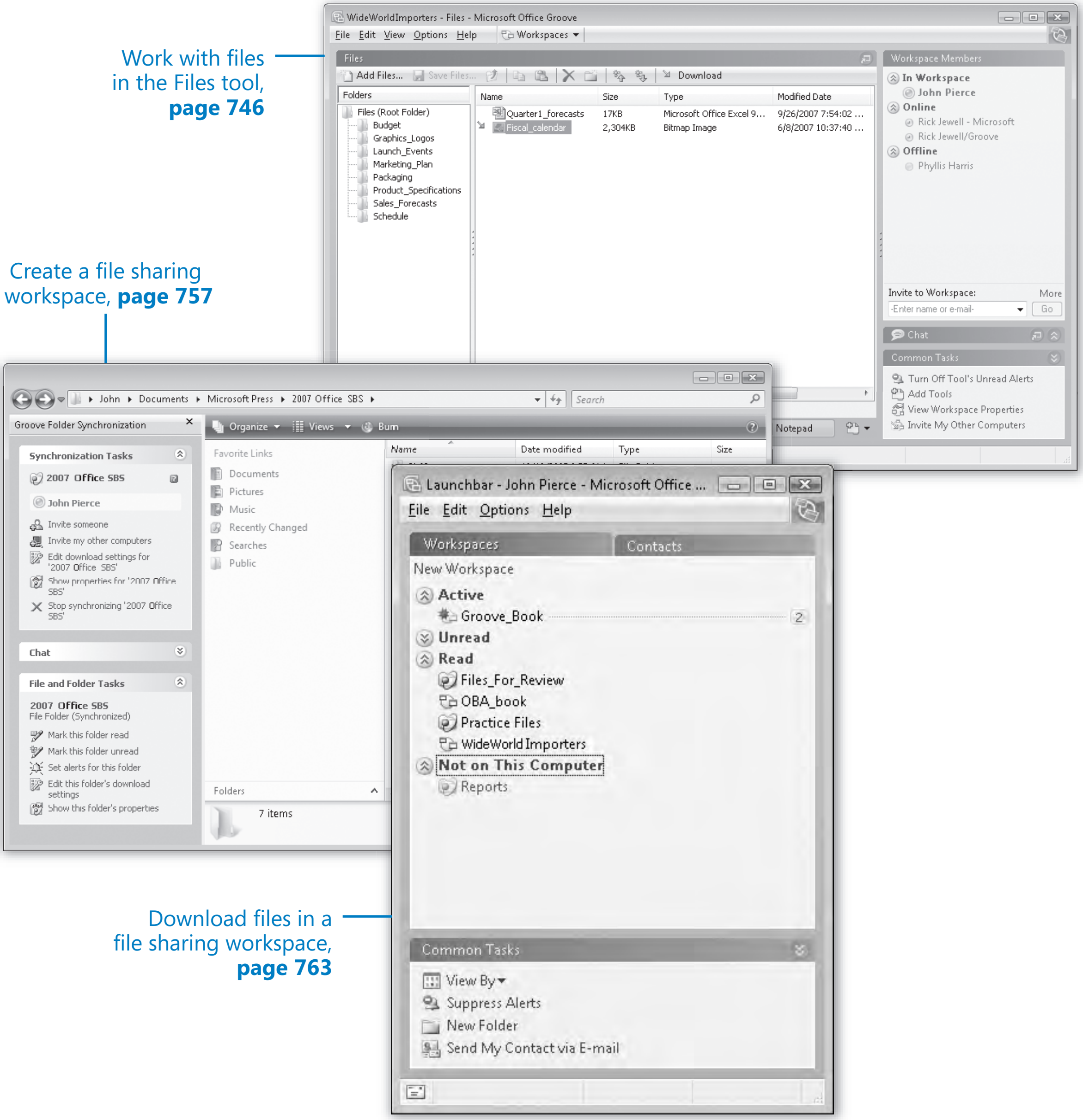
Key Points

- Workspaces are at the center of the collaborative work you do in Groove. Workspaces have members. Each member has a specific role, and each role has specific permissions.
- Members of a workspace who are assigned the Manager role have permission to invite and uninvite members and to add and delete tools. Managers can also assign a member to a different role or change the permissions assigned to a role.
- Workspaces include tools, such as the Files tool and the Discussion tool, as well as features that you use to initiate actions with workspace members—sending an instant message, for example, or alerting a member that you need them to open a workspace as soon as possible.
- You can use the Workspace List, the Workspace Selector, and the toolbar to move between workspaces. You can also organize your view of workspaces by status and other categories.

Chapter at a Glance

Work with files in the Files tool, **page 746**

Create a file sharing workspace, **page 757**



Download files in a file sharing workspace, **page 763**

26 Managing and Sharing Files

In this chapter, you will learn to:

- ✔ Add folders and files to the Files tool.
- ✔ Work with files in the Files tool.
- ✔ Open, edit, and save a file in the Files tool.
- ✔ Specify download settings for a folder.
- ✔ Set permissions in the Files tool.
- ✔ Specify alert settings for folders and files.
- ✔ Create a file sharing workspace.
- ✔ Download files in a file sharing workspace.
- ✔ Change roles and permissions for a file sharing workspace.
- ✔ Set properties for a file sharing workspace.

In most of the standard workspaces that you set up and work with in Microsoft Office Groove 2007, you will spend time reviewing files such as word-processing documents, spreadsheets, presentations, and images. You will likely create some of these files and add them to a workspace to share with other members. Other members will also add and update files that you need in your work. As you and workspace members review and make changes to these files, Groove takes care of synchronizing changes, updating the version of the file in the workspace so that all members have access to the current file.

If you are comfortable using Windows-based programs, you will find that the work of managing and sharing files in Groove is easy and straightforward. Managing and sharing files in Groove can also help eliminate redundant and potentially out-of-date or inaccurate copies of files. For example, a common practice in many workgroups is to distribute drafts of a document as an e-mail attachment. This approach is effective in getting a copy of the file in everyone's hands, but it raises issues about how to consolidate each person's changes and comments, and it can also lead to confusion about which copy is the "master" copy—the one you want to send to your client or your boss. With Groove, you can

keep one copy of a file in a workspace that members use in common. Members with the appropriate role and permissions can update the file, and these changes are synchronized so that the file remains up to date and all members know which copy is current.

See Also For more information about workspace roles and permissions, see "Changing the Role of a Workspace Member" and "Changing Permissions Assigned to a Workspace Role" in Chapter 25, "Setting Up a Standard Workspace."

In this chapter, you will learn about two of the ways in which you can manage and share files in Groove. In the first several exercises, you'll learn how to work with the Files tool, one of the tools that Groove includes in a standard workspace by default. You'll learn how to create folders and add files to the Files tool, how to specify ***download settings***, how to work with files, and how to manage file permissions and alerts.

You'll also learn how to set up a ***file sharing workspace***, a type of Groove workspace that is designed for sharing files between more than one computer (for people who use more than one computer) and among the people who are members of the workspace. In addition to learning how to create a file sharing workspace, you'll learn how to specify download settings and manage other properties for the workspace.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

> **Important** Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

> **Troubleshooting** Graphics and operating system–related instructions in this book reflect the Windows Vista user interface. If your computer is running Windows XP and you experience trouble following the instructions as written, please refer to the "Information for Readers Running Windows XP" section at the beginning of this book.

Adding Folders and Files to the Files Tool

Organizing the files in a workspace can take place in several ways. The person who creates the workspace—a department manager or a project lead, for example—might set up a group of folders that are available to other members when they join the workspace. A workspace might be created from a workspace template that includes a set of folders and, possibly, specific files. Workspace members can take part in organizing the workspace as well, of course, creating folders and adding files as the work they are using the workspace to manage takes shape and develops over time.

See Also For another example of how to add a file to the Files tool, see "Adding Files to the Files Tool," in Chapter 25, "Setting Up a Standard Workspace."

You can organize folders and files in a Files tool in much the same way that you organize folders and files in a folder that is part of the Windows file system. The Files tool includes a root folder (named *Files* by default). You can add folders, subfolders, and files to the root folder to create the structure and hierarchy you need.

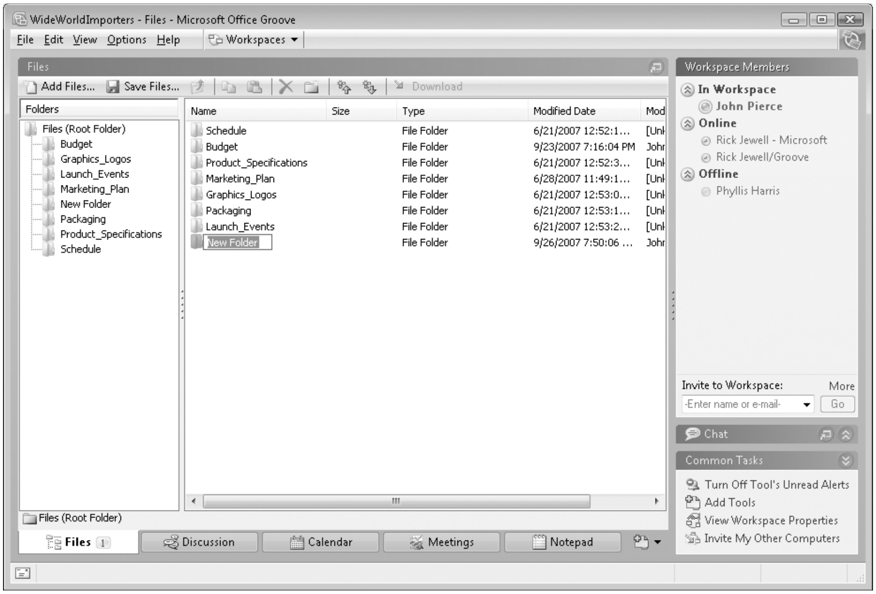
> **Important** Adding a file that is stored in a folder on your computer to the Files tool in Groove does not "move" the file to Groove and remove it from the folder. Changes that you make to the file in the folder are not reflected in the copy of the file in Groove. After you add a file to a Groove workspace, you should consider deleting the file from the folder on your hard disk.

In this exercise, you will create a folder and add files in the Files tool.

> **USE** the *Quarter1_Forecasts* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\GrooveFiles* folder.
>
> **BE SURE TO** log on to Groove with your standard account before beginning this exercise.
>
> **OPEN** the WideWorldImporters workspace, and display the Files tab.

1. In the **Folders** pane, click the *Files* folder.
2. On the **File** menu, point to **New**, and then click **Folder**.

A folder icon with the name *New Folder* appears in the list pane.

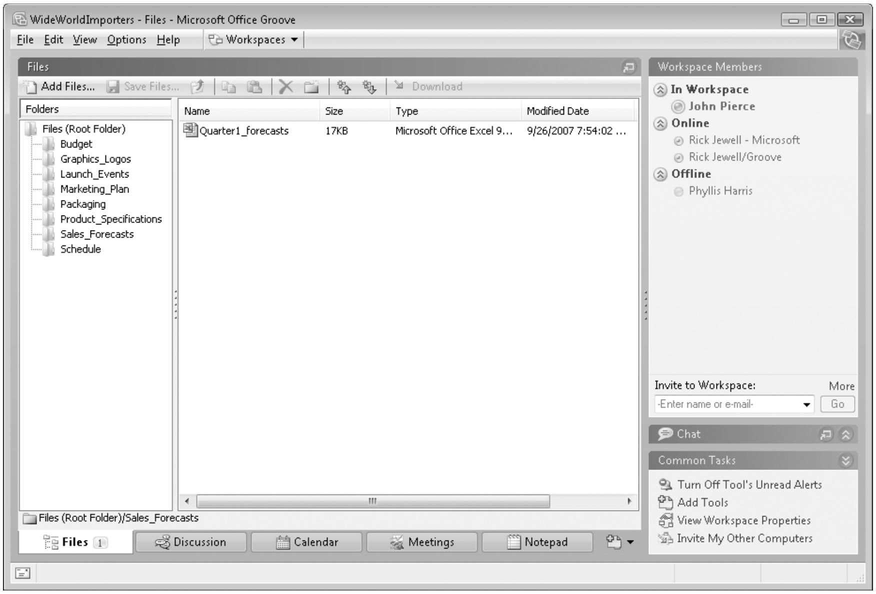


3. Type **Sales_Forecasts** as the name of the folder, and then press Enter.

> **Tip** To rename a folder, right-click the folder in the Folders pane, and then click Rename.

4. Double-click the *Sales_Forecasts* folder.
5. On the **File** menu, click **Add Files**.
6. In the **Add Files** dialog box, navigate to the *Documents\Microsoft Press\2007OfficeSBS\GrooveFiles* folder, select the *Quarter1_Forecasts* file, and then click **Open**.

The file is added to the Files tool in Groove.



> **Tip** You can add more than one Files tool to a standard workspace. You might, for example, use one Files tool for files related to a project's finances and a second Files tool to manage and share files related to marketing, promotions, or similar topics. For more information about adding a tool to a standard workspace, see "Adding a Tool to a Standard Workspace," in Chapter 25, "Setting Up a Standard Workspace."

> **Tip** You can also add a file to the Files tool by dragging the file from a folder in the Windows file system to the Files tool.

Working with Files in the Files Tool

You can work with files in a Files tool by using commands on the File and Edit menus on the Workspace Explorer menu bar, by using buttons on the toolbar on the Files tool, and by using commands on a shortcut menu that Groove displays when you right-click a selected file or a blank area of the file pane.

The File menu provides commands you can use to add, save, and rename files, for example. The Edit menu includes standard commands for copying and pasting files. The toolbar includes buttons you can use to add a file to the Files tool or save a file to a folder on your hard drive. The toolbar also includes the buttons listed and described in the following table.

Use this button	To
	Move up to a parent folder.
	Copy selected files or folders.
	Paste selected files or folders.
	Delete files or folders.
	Create a folder in the Files tool.
	Move to the previous unread item.
	Move to the next unread item.
	Download files to your local copy of the workspace.

See Also For more information about download settings for the Files tool, see "Specifying Download Settings for a Folder" later in this chapter.

The shortcut menu includes commands such as Open, Edit, New, Rename, and Delete. The menu also includes the Copy As Link command, which you can use to embed a link to a file in a Groove instant message or in another tool in the workspace—a meeting agenda, for example, if the file is related to one of the meeting's topics. The Copy As Link command is another example of how you can merge the features in Groove to facilitate group communication and collaboration.

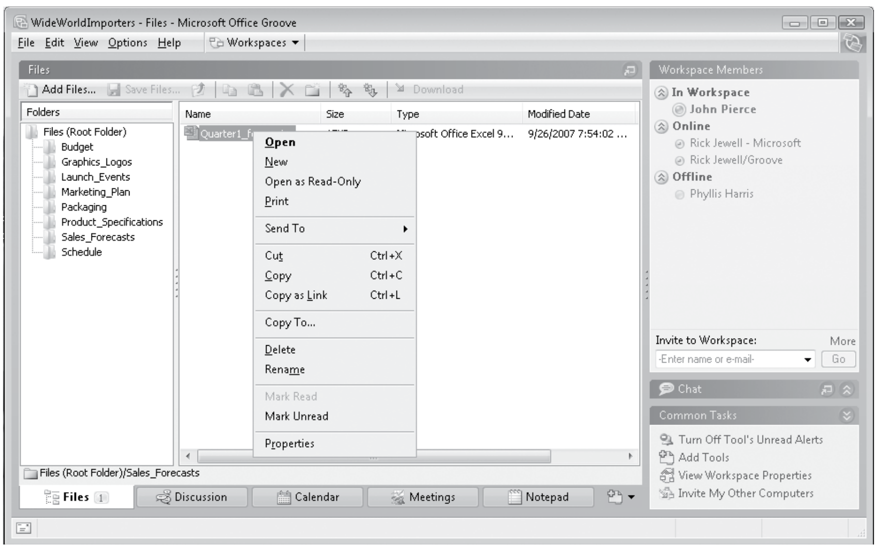
In this exercise, you will embed a link to a file in a Groove instant message.

USE the *Quarter1_Forecasts* workbook that you saved to the *Sales_Forecasts* folder in the previous exercise.

OPEN the WideWorldImporters workspace, if it is not already open.

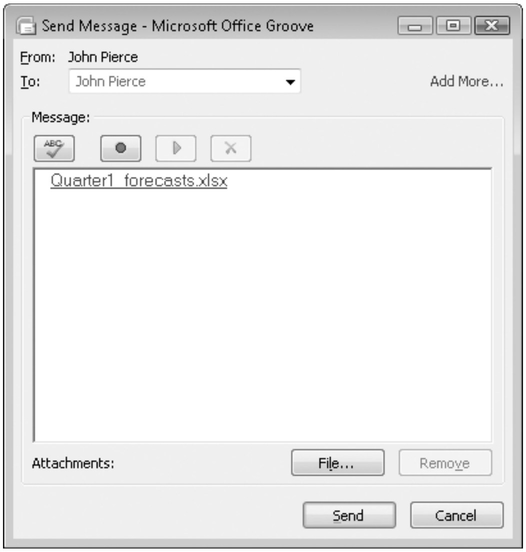
1. In the **Workspace Explorer**, double-click the *Sales_Forecasts* folder.
2. In the files list, right-click the *Quarter1_Forecasts* file.

   The Files tool shortcut menu appears.



3. On the shortcut menu, click **Copy as Link**.
4. On the **Options** menu, click **Send Message**.
5. In the **Send Message** window, select your name in the **To** list.
6. In the **Message** area, right-click and then click **Paste**.

The link to the file appears in the Send Message window.



7. Click **Send**.
8. Click the Groove alert that is displayed when you receive the message.
9. Click the link to the file in the message.

   Groove displays the folder in the Files tool where the file is stored.

Opening, Editing, and Saving a File in the Files Tool

The steps you follow to open and edit a file from the Files tool in Groove will be familiar if you have worked in other Microsoft Office applications. You can, for example, right-click a Microsoft Office Word document in the Files tool, click Open, and the file opens in Word, ready for revision. After revising a file that you open from the Files tool, however, you need to be sure that you save changes back to Groove as well as saving the changes in Word or whichever application was used to create the file.

Troubleshooting More than one member of a workspace can open and edit the same file at the same time (assuming these members have the right level of permission), and then save their changes back to Groove. When this occurs, Groove considers the event an editing conflict. When conflicts arise, the changes made by the member who saved the file back to Groove first are saved in the original file. Other members who had the file open and made changes are prompted to save their changes in a new version of the file. You can then get together to review the changes each member made and incorporate all edits in the file.

In this exercise, you will save changes to a file that you have opened from the Files tool so that the changes are available for all members of the workspace.

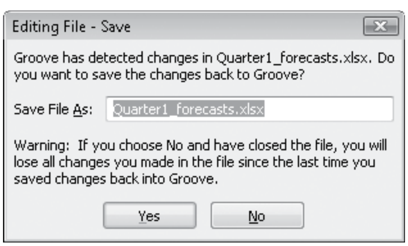
USE the *Quarter1_Forecasts* workbook that you modified in the previous exercise.
OPEN the WideWorldImporters workspace, if it is not already open.

1. In the **Folders** pane of the **Files** tool, double-click the *Sales_Forecasts* folder.
2. Right-click the *Quarter1_Forecasts* file, and then click **Open**.
3. Enter your name and the date at the top of the file.

Microsoft Office Button

4. Click the **Microsoft Office Button**, and then click **Save**.
5. Click the **Microsoft Office Button**, and then click **Exit Excel**.

   Groove displays the Editing File - Save dialog box.



6. Click **Yes** to save the changes you made back to Groove.

Tip If you want to save the file to Groove by using a different name, enter the name in the Save File As box, and then click Yes.

Specifying Download Settings for a Folder

Groove keeps the files in the Files tool synchronized by downloading files added to the workspace as well as changes that are made to files that the workspace already contains. The recommended download setting for the Files tool (which Groove uses by default) is to download all changes automatically. In most cases, you can keep this setting. When another workspace member modifies a file or adds a file to the Files tool, Groove downloads these changes soon after they occur or the next time you log on to Groove.

In some cases, however, you might want to modify the recommended setting to gain more control over when changes and additions are downloaded. Let's say you are traveling and paying for a connection to the Internet. You might not want to take the time to download any files or at least files that exceed a certain size. You might want to retain automatic downloading for folders that contain files you need to refer to while you are away but wait until you return to the office to manually download new files and changes for folders that are less time-sensitive or critical.

You have the following options for controlling the download settings for the folders in the Files tool:

- Download automatically (the default and recommended setting).
- Specify a size restriction for downloading changes. For example, you can download any changes that are less than 1 megabyte (MB) automatically, but changes that exceed that size will be downloaded manually.
- Download all changes manually.

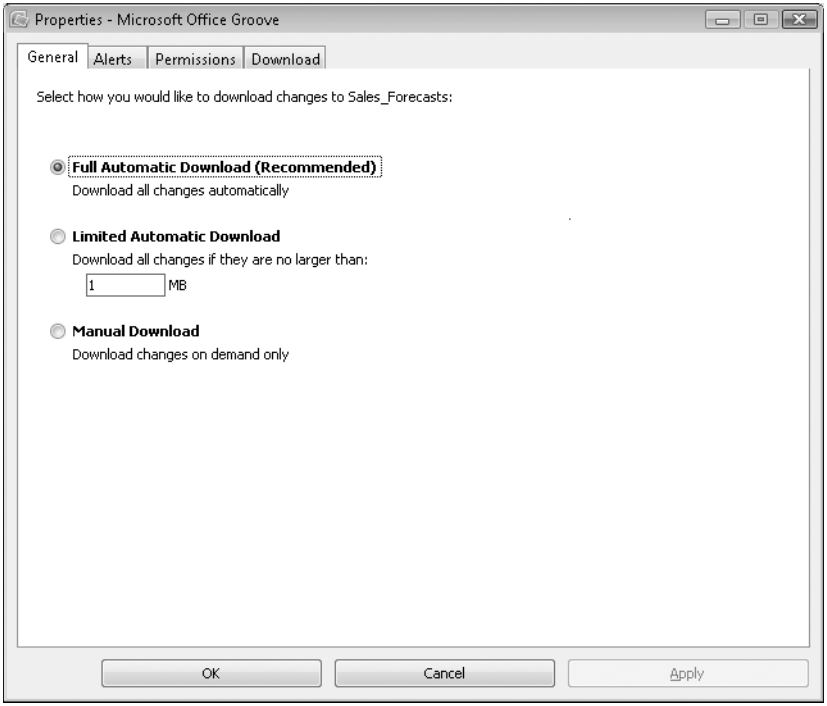
In this exercise, you will specify the download settings for a folder in the Files tool.

USE the *Sales_Forecasts* folder that you created earlier in this chapter.
OPEN the WideWorldImporters workspace, if it is not already open.

1. In the **Folders** pane of the **Files** tool, click the *Sales_Forecasts* folder.

2. On the **File** menu, click **Folder Download Settings**.

   The Properties dialog box opens with the General tab displayed.



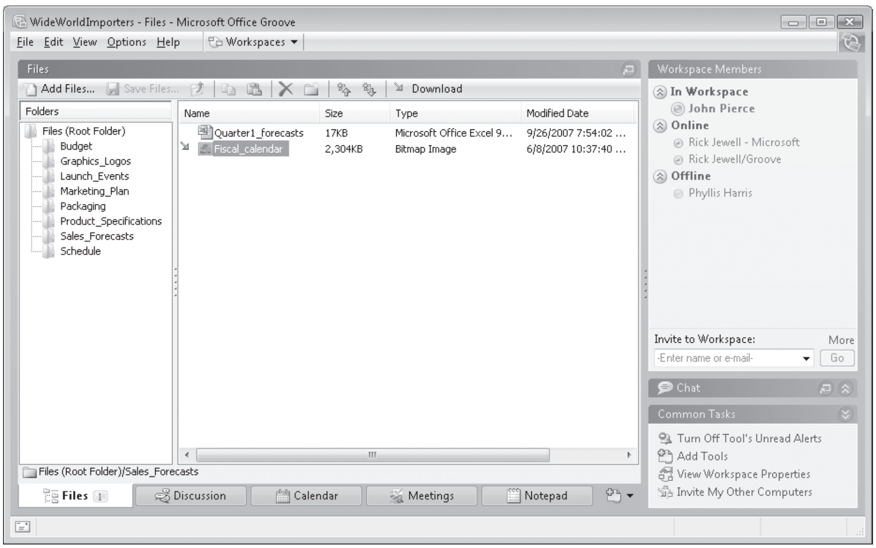
3. On the **General** tab, click **Limited Automatic Download**.

   Groove specifies 1 MB by default as the size threshold after which changes will not be downloaded. You can increase this amount if you want or specify a fractional value (.5 MB, for example), but you cannot change the unit of measure. (In other words, you cannot change megabytes to kilobytes.)

4. In the **Properties** dialog box, click **OK**.

Downloading a File Manually

As you learned in the previous exercise, you can set up Groove to download files to the File tools manually or to download only those changes that do not exceed a file size that you specify. By controlling download settings, you can take advantage of the mechanisms Groove uses to keep files synchronized by choosing when you want to download updates. When a file needs to be downloaded manually, you'll see a small arrow icon next to the file's name in the Files tool. Click the Download button in the toolbar to start downloading the file.



Setting Permissions in the Files Tool

As we discussed in Chapter 25, each member of a workspace has a role, and each workspace role has specific permissions that control what members with that role can do. You can also set permissions for each tool in a workspace to control which actions members with a specific role can perform when working with the content of that tool. For example, you might want to grant workspace members with the Guest role the permission to add files to the Files tool and modify the files they add, but retain their restriction to not modify files added by other members.

You can also specify permissions for a folder in the Files tool. Workspace managers, for example, should have full permissions to work with files in the *Budget* folder, but you might want to restrict members who are Participants from modifying these files. The permissions you set for a tool take precedence over the permissions in place for the entire workspace. Similarly, the permissions you set for a particular folder override the permissions you set for the tool.

The following table lists the permissions you can set for the Files tool and for specific folders and which role has permission to perform these actions by default. Members with the Guest role cannot perform any of these actions by default.

Permission	Default workspace role
Add files/subfolders	Manager; Participant
Modify all files	Manager; Participant
Modify own files	Manager; Participant
Delete all files/subfolders	Manager
Delete own files/subfolders	Manager; Participant
Modify permissions	Manager

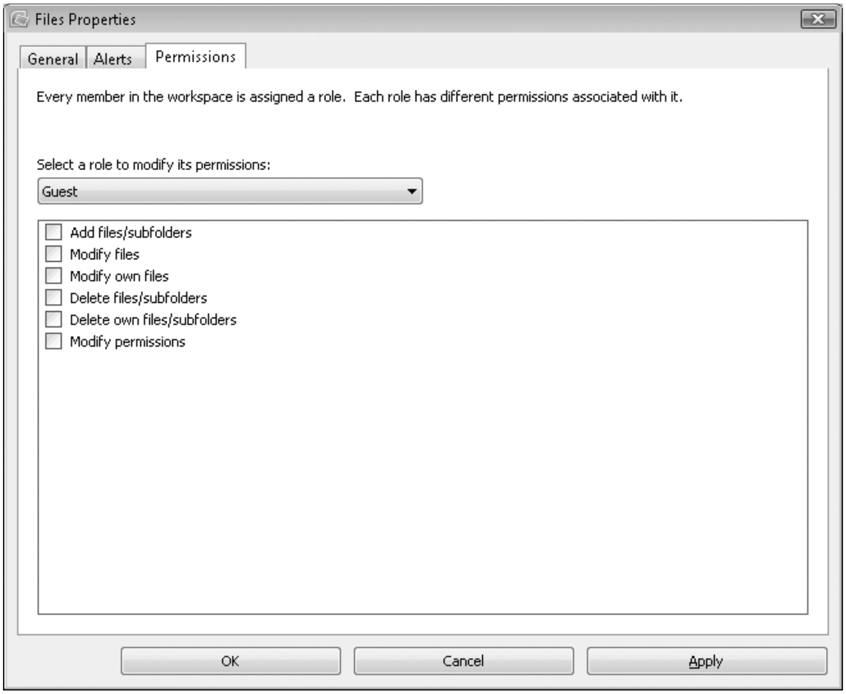
In this exercise, you will set permissions for the Files tool and for a specific folder.

BE SURE TO log on to Groove before beginning this exercise.
OPEN the WideWorldImporters workspace, if it is not already open, and display the Files tool tab.

1. On the **File** menu, point to **Properties**, and then click **Tool**.
2. In the **Files Properties** dialog box, click the **Permissions** tab.

3. In the **Select a role to modify its permissions** list, select **Guest**.

   The list of permissions shows which permissions are granted to this role (none in the case of Guests).



4. In the list of permissions, select the **Add files/subfolders** and **Modify own files** check boxes, and then click **OK**.
5. In the **Folders** list, right-click the *Budgets* folder, and then click **Properties**.
6. In the **Properties** dialog box, click the **Permissions** tab.
7. In the **Select a role to modify its permissions** list, select **Participant**.
8. In the list of permissions, clear the check boxes for **Modify files** and **Modify own files,** and then click **OK**.

Specifying Alert Settings for Folders and Files

The alerts that Groove displays keep you informed of activity in a workspace. By default, each tool in a workspace inherits the settings for alerts that are specified for the workspace at large.

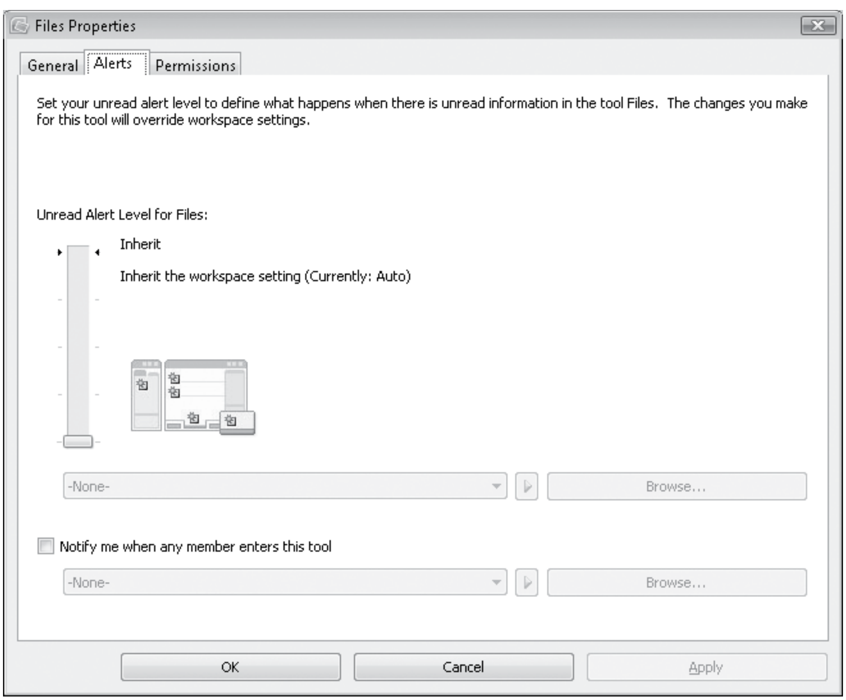
You can manage alerts in more detail by specifying settings for the Files tool (and other workspace tools). The settings for the tool then take precedence over alert settings for the workspace. Within the Files tool, you can also specify alert settings for a particular folder or file. For example, let's say that alerts for the workspace Files tool are set to Medium, which means that unread content in the tool is highlighted. Now you and other members of the workspace are facing a deadline for completing your marketing plan. You can set the alert level for the *Marketing_Plan* folder to High, which overrides the alert settings for the Files tool, and you'll be notified of changes by an alert displayed in the task bar. You could also specify an alert level of High for the marketing plan file itself and keep the setting for the folder the same as the tool.

In this exercise, you will specify alert settings for the Files tool, a folder, and a file.

USE the *Quarter1_Forecasts* workbook that you saved to the *Sales_Forecasts* folder in the previous exercise.

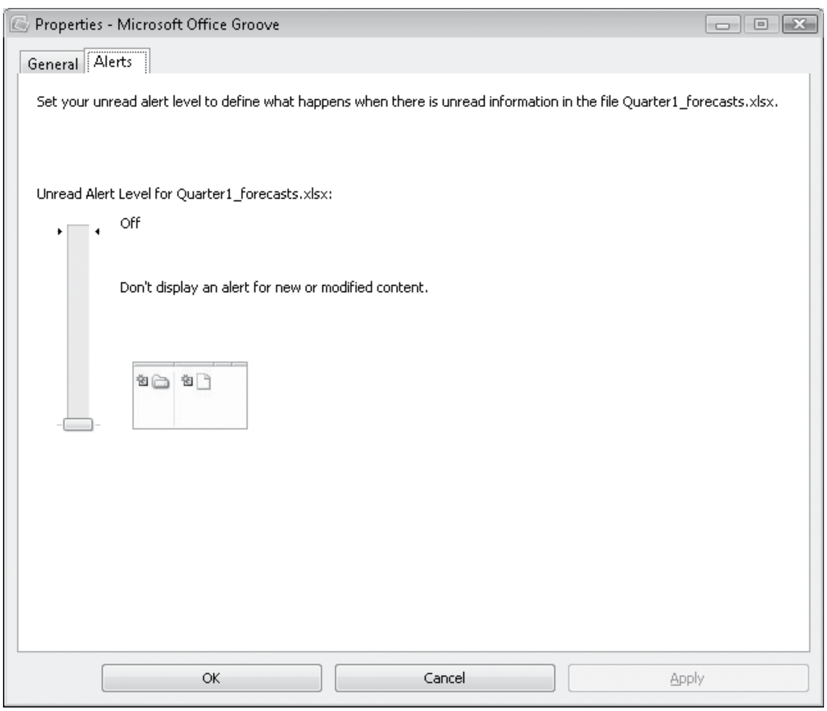
OPEN the WideWorldImporters workspace, if it is not already open, and display the Files tool tab.

1. On the **File** menu, point to **Properties**, and then click **Tool**.
2. In the **Files Properties** dialog box, click the **Alerts** tab.



3. Move the slider to **Medium**, and then click **OK**.
4. In the **Folders** pane, right-click the *Marketing_Plan* folder, and then click **Properties**.
5. In the **Properties** dialog box, click the **Alerts** tab.
6. Move the slider to **High**, and then click **OK**.
7. In the **Folders** pane, double-click the *Sales_Forecasts* folder, and then click the *Quarter1_Forecasts.xlsx* file.
8. On the **File** menu, click **Properties**, and then click **File**.
9. In the **Properties** dialog box, click the **Alerts** tab.

   Notice the information at the top of the dialog box, which indicates that you are setting alerts for *Quarter1_Forecasts.xlsx*.



10. Move the slider to **High**, and then click **OK**.

CLOSE the WideWorldImporters workspace, and then log off from and close Groove before proceeding to the next exercise.

Creating a File Sharing Workspace

Another approach to managing and sharing files in Groove is to create a file sharing workspace. You can use a folder already on your computer as a file sharing workspace or set up a new folder when you create a workspace. A file sharing workspace is a type of Groove workspace that you can use to share the contents of a folder in your Windows file system with each computer on which you have your Groove account and with other Groove users who are invited to join the workspace. All the members of a file sharing workspace have access to the files and subfolders it contains.

If you use more than one computer—for example, a desktop computer at your office and a laptop computer when you travel, or a computer at work and your computer at home to catch up—you can set up a file sharing workspace to help manage your files. When you're online, Groove takes care of updating the files stored in the folder (either automatically or at your request) so that the list of files and their state are synchronized.

When you set up a folder as a file sharing workspace, Groove displays two task panes that you use to manage the workspace. You use links on the Synchronization Tasks task pane to send an invitation, edit download settings, or specify other properties for the workspace. With the File And Folder Tasks task pane, you can set alerts and manage properties for a specific folder in the workspace.

You can set up a subfolder in a folder that is already defined as a file sharing workspace as another file sharing workspace. You might want to do this to share the contents of a specific folder in a file sharing workspace with a different set of people. For example, you might set up a subfolder for project reports that you share with people who aren't a part of the regular project team. Groove displays a message when you start sharing a folder in this way as a reminder that you have selected a folder that is already being synchronized. Keep in mind that members of a file sharing workspace have access to all the files in the workspace, even if those files are contained in a subfolder that's been defined as a file sharing workspace in which they're not members. For example, Rick, Phyllis, and John are members of the file sharing workspace created for the folder named *Project Files*. In the *Project Files* folder, the subfolder *Reports* is set up as a file sharing workspace whose members are Rick and Phyllis. John still has access to the files in the subfolder *Reports* because it is contained in a file sharing workspace (the *Project Files* folder) of which he is a member.

Some Do's and Don'ts for a File Sharing Workspace

A file sharing workspace is best suited to managing a relatively small number of files that do not have a large file size (individually or in aggregate); otherwise, you might experience slow performance. Three good rules to follow are these:

- Avoid adding files that are larger than 50 MB.
- Avoid adding more than 100 files at one time.
- Avoid storing more than 500 files in a file sharing workspace.

> **Tip** These numbers are recommended by Microsoft and are based on the minimum system requirements for Groove. Systems that exceed the minimum requirements can manage larger numbers of files without seeing a decline in performance.

Groove cannot synchronize files that are larger than 1 GB. Groove will stop synchronizing a file sharing workspace when the workspace contains more than 5,000 files or when the total size of the files it contains exceeds 2 GB.

Here are some other guidelines to follow and observe to get the most from working with a file sharing workspace:

- You are likely to see slower performance in a workspace that contains files that are changed frequently.
- Workspaces that contain a large number of files or files of greater size will perform better if the files are not frequently changed.
- Downloading files and changes manually means that data does not need to be synchronized whenever updates to files are made. This can improve performance for all members.
- Keep Groove running rather than starting and stopping it frequently.
- All members of the workspace should use the latest version of Groove.

- Pausing communications for a workspace also pauses the synchronization of local changes to the workspace. In large workspaces, pause communications until updates are necessary.
- Don't include files that depend on other files to run properly or files for applications that you plan to run from a different computer. These types of files include Microsoft Office Outlook .pst files, Quickbook files, and Microsoft Office Access database files.
- Groove warns you about setting up a file sharing workspace if you select the root folder of a computer drive for sharing or select any folder within the Windows system directory.

Groove does not allow you to share the following types of folders in a file sharing workspace:

- A folder on removable media, such as a CD or floppy disk.
- A folder on a network drive.
- Any folder within the Groove data directory.
- Any folder for which you do not have write permissions; that is, folders in which you cannot create new files.
- Any folder already being synchronized in a file sharing workspace by another Groove account.
- Any file that has a file name that starts with a tilde (~) character or any files with the file extension .gfs, .tmp, .bak, .sav, or .lnk cannot be shared in a file sharing workspace. Additionally, files with the Hidden, System, Temporary, or Offline attributes cannot be shared.

You can create a file sharing workspace while working in Windows or from Groove by using the New Workspace command. In the next two sections, you'll learn how to create a file sharing workspace through each of these methods.

Creating a File Sharing Workspace in Windows

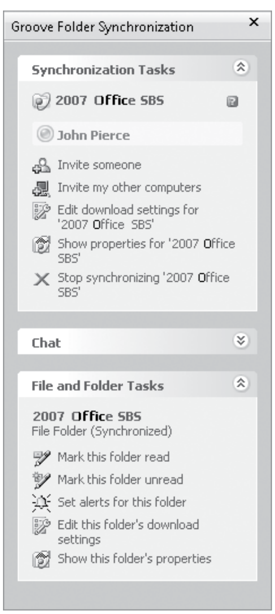
When you are working in your *Documents* folder in Windows Vista, for example, you can set up a folder for synchronization (in other words, create a file sharing workspace) provided that Groove is installed on that computer. You might follow this approach to convert a folder that is already on your system into a file sharing workspace, which avoids the steps of having to name a new workspace and designate the folder's location.

In this exercise, you will create a file sharing workspace in Windows Vista. You do not need to log on to Groove for this exercise.

BE SURE TO install the practice files to the default location before beginning this exercise.
OPEN your *Documents\Microsoft Press* folder.

1. Right-click the *2007OfficeSBS* folder, point to **Groove Folder Synchronization**, and then click **Start Synchronizing**.
2. In the confirmation message box that appears, click **Yes**.

   The folder opens in a new window that displays the Synchronization Tasks task pane and the File And Folder Tasks task pane.



Tip If you are working on a computer that runs the Windows XP operating system, the steps for setting up a file sharing workspace are essentially the same. In the window, click Folder Sync on the toolbar. In the task pane that appears, click Start Synchronizing. You'll then see the task panes that you use to manage the file sharing workspace.

Creating a File Sharing Workspace from the Launchbar

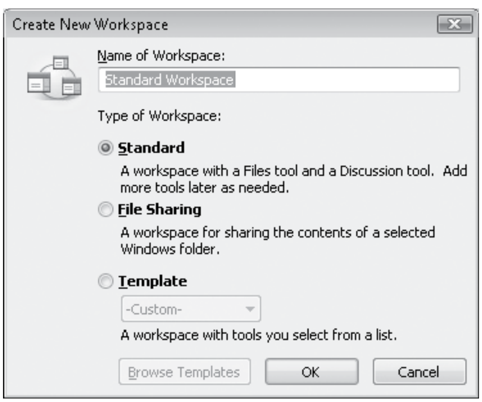
You can also create a file sharing workspace from the Groove Launchbar. In this approach, you proceed through several steps to create a workspace. After indicating that you want to create a file sharing workspace, Groove provides you with options for selecting a folder for the workspace's files. You can create a new folder on your desktop, create a new folder in a location you choose, or select a folder that is already defined in your system.

In this exercise, you will set up a file sharing workspace from the Groove Launchbar.

BE SURE TO log on to Groove with your standard account before beginning this exercise.

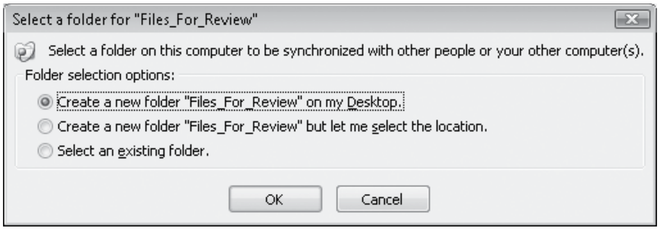
1. On the **Launchbar**, click the **Workspaces** tab.
2. Click **New Workspace.**

   The Create New Workspace dialog box opens.



3. Click **File Sharing**.
4. In the **Name of Workspace** box, type Files_For_Review, and then click **OK**.

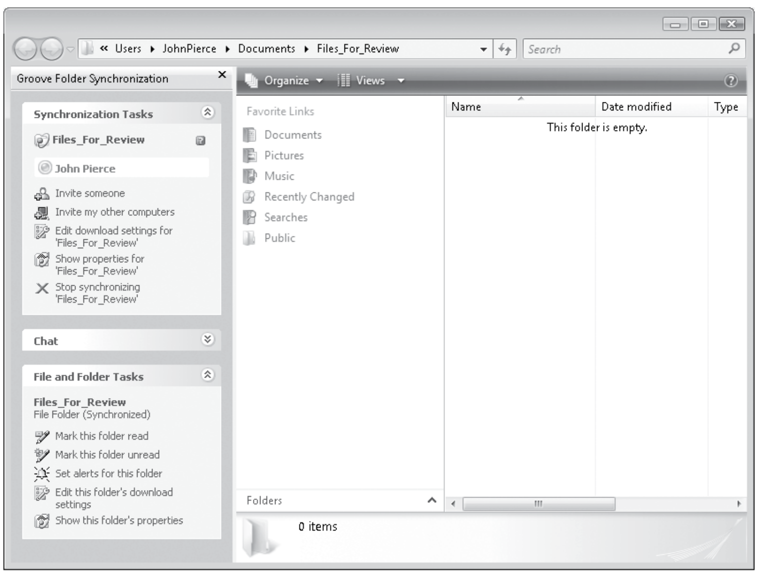
The Select A Folder For “Files_For_Review” dialog box opens.



5. Click **Create a new folder “Files_For_Review” but let me select the location.** and then click **OK**.

6. In the **Browse For Folder** dialog box, click your user name, click the *Documents* folder, and then click **OK**.

   The folder opens and displays the Synchronization Tasks task pane and the File And Folder Tasks task pane.



CLOSE the Files_For_Review workspace before continuing to the next exercise.

Tip To invite someone to become a member of a file sharing workspace, you follow the same steps as those for inviting someone to join a standard workspace. First click Invite Someone in the Synchronization Tasks task pane. Select or enter the name (or e-mail address) of the person or persons you want to invite, type a message if you want, and then click Invite. For information about inviting someone to be a member of a standard workspace, see "Sending and Accepting Workspace Invitations," in Chapter 25, "Setting Up a Standard Workspace."

To remove a member from a file sharing workspace, right-click the member's name in the Synchronization Tasks task pane, and then click Uninvite. You must be a workspace manager to remove a member from a workspace.

Downloading Files in a File Sharing Workspace

To start working with the files in a file sharing workspace, either as a new member of the workspace or if you are using the file sharing workspace on another computer, you first need to download the files. The files and data are not downloaded automatically; you need to specify a folder on your computer where the workspace will be located and then specify whether you want to download the data immediately (assuming that another member of the file sharing workspace is online so that your computer has access to the files) or to download only links. If you choose to download only links, the file sharing workspace on your computer will list the files in the workspace, and you can download the content of the files later when you need to work with a specific file.

Groove offers a default choice about which downloading option to use depending on how much data is contained in the file sharing workspace. If the workspace contains 100 files or more, or if any one file is 100 MB or larger, the manual download option is presented as the default option. Otherwise, the option to download the content immediately is suggested as the default. If you download the files immediately, Groove goes to work, and copies of the files are created in the location you specified. If you choose the manual option, when you need to work with a file, first select it, and then in the File And Folder Tasks task pane, click Download This File.

Tip When a file is added to a file sharing workspace, before it is downloaded it is displayed with a download indicator (a small arrow) and is listed with the file type Microsoft Office Groove Remote File rather than its actual file type.

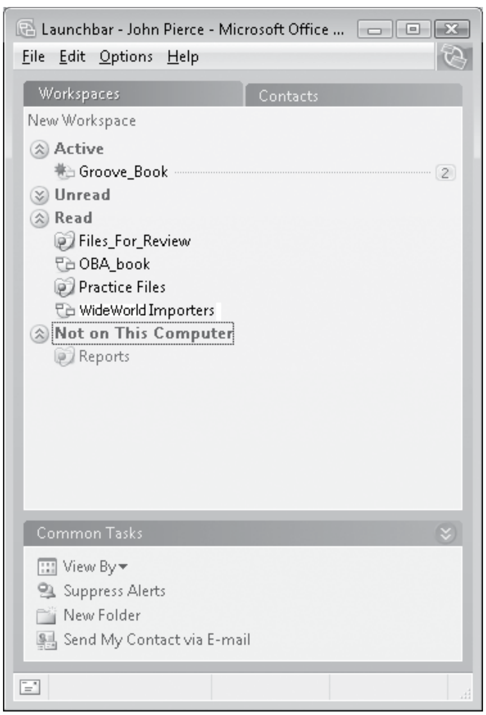
In this exercise, you will download files for a file sharing workspace being used by one account on more than one computer.

Important To complete this exercise, you need to have set up your Groove account on more than one computer and have created a file sharing workspace on one of those computers.

BE SURE TO log on to Groove on both computers on which you have set up Groove accounts, before beginning this exercise.

1. On the computer on which the file sharing workspace is not yet set up, click the **Workspaces** tab on the **Launchbar**.

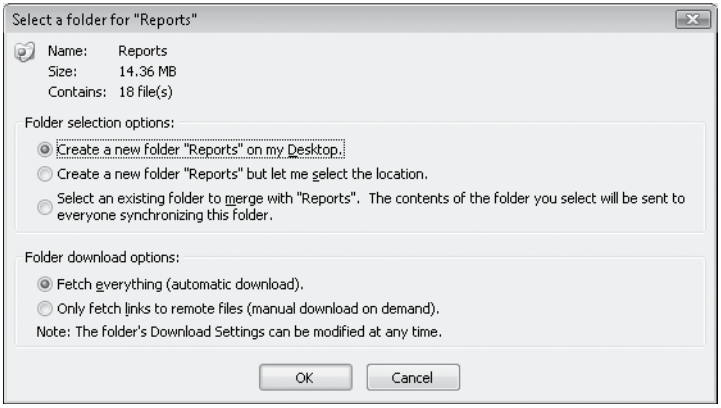
   The name of the workspace is listed below Not On This Computer (assuming that workspaces are sorted by status).



2. Click the name of the workspace, which is *Reports* in this example.

3. In the **Common Tasks** area, click **Get Workspace**.
4. Double-click the name of the workspace.

   The Select A Folder For "Reports" dialog box opens.



5. In the **Folder selection options** area, click the option to select an existing folder.
6. In the **Folder download options** area, click **Only fetch links to remote files**, and then click **OK**.
7. In the **Browse For Folder** dialog box, select the folder you want to use, and then click **OK**.

CLOSE any open file sharing workspace folders before proceeding to the next exercise.

Changing Roles and Permissions for a File Sharing Workspace

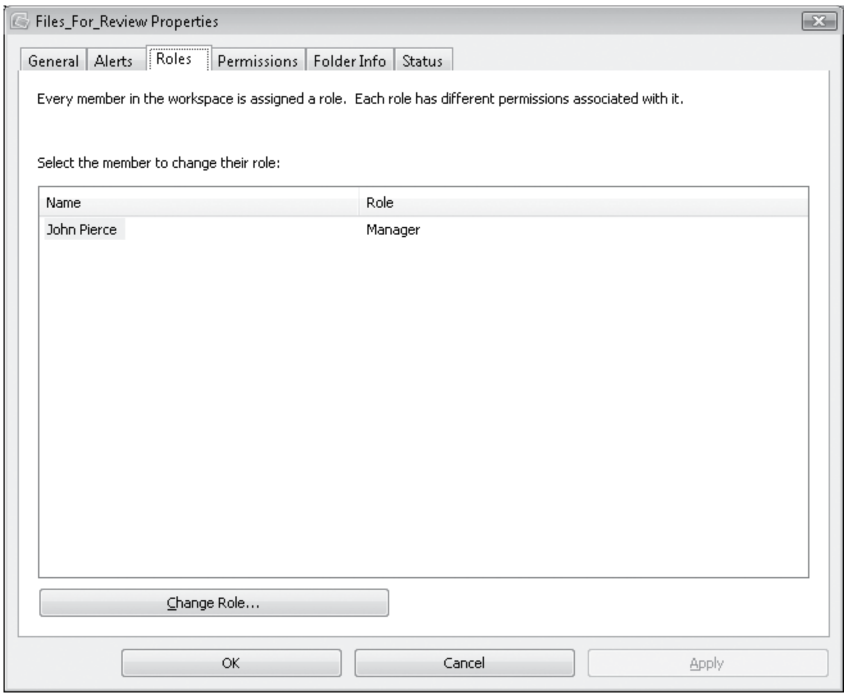
Each member of a file sharing workspace is assigned to the role Manager, Participant, or Guest, just as are the members of a Groove standard workspace. Likewise, each role is granted specific permissions by default. Managers, for example, can invite members, remove a member (by uninviting that member), and cancel outstanding invitations. A Participant can also invite others to become members of the file sharing workspace, but a Participant cannot uninvite members or cancel invitations. A Guest can look at the files in a file sharing workspace, but a Guest cannot invite, uninvite, or cancel invitations. Only a person who has the Manager role can change the role of another member or change the permissions for a specific role.

In this exercise, you will change roles and role permissions for a file sharing workspace.

USE the Files_For_Review file sharing workspace you created earlier in this chapter.
OPEN the Files_For_Review workspace.

1. In the **Synchronization Tasks** task pane, click **Show Properties for "Files_for_Review"**.
2. In the **Files_For_Review Properties** dialog box, click the **Roles** tab.

   Workspace members are listed on this tab by role.



3. Select the member whose role you want to change, and then click **Change Role**.
4. In the **Change Role** dialog box, select the new role, and then click **OK**.
5. In the **Files_For_Review Properties** dialog box, click the **Permissions** tab.
6. In the **Select role to modify its permissions** list, select **Participant**.
7. In the list of permissions, select the **Uninvite** check box, and then click **OK**.

CLOSE the Files_for_Review file sharing workspace.

Setting Properties for a File Sharing Workspace

After you are up and running in a file sharing workspace, you can choose options for how to keep the folder synchronized. For example, you might have elected to download all the data immediately when you first joined or first added your Groove account to a second computer. You can maintain that approach for files that are added to the workspace in the future, or you can switch to downloading files manually.

See Also For more information about initially downloading files for a file sharing workspace, see "Downloading Files in a File Sharing Workspace" earlier in this chapter.

If you select the manual download setting for a file sharing workspace, you should keep in mind that you'll need to take care of downloading all the files that other members add to the folder as well as new files that you add to the folder on other computers that you use. You can switch to Full Automatic Download, the recommended approach for keeping up with changes in the files you're sharing between computers and with others, or take the middle road and specify a size limit, in megabytes, for changes that are automatically downloaded. Specifying a size limit might be helpful in cases in which a number of large graphic files are included in a file sharing workspace or a number of Microsoft Office PowerPoint presentations, which tend to be larger than Microsoft Office Excel workbooks, Microsoft Office Word documents, or other types of files. If you decide to manage downloading manually for the workspace, you can still choose an option to keep a particular file automatically up to date.

As you can for folders and files in the Files tool in a standard workspace, you can set alerts for these items in a file sharing workspace. For a file sharing workspace in general, you can set alerts at various levels. For folders and files, seeing alerts are a yes-or-no proposition. You can turn off alerts for a specific folder or file, or you can enable an alert so that you know when a folder contains unread information or a file has been changed.

In this exercise, you will set properties in a file sharing workspace. You will choose the option to update a file automatically and set an alert to see when the file has been changed.

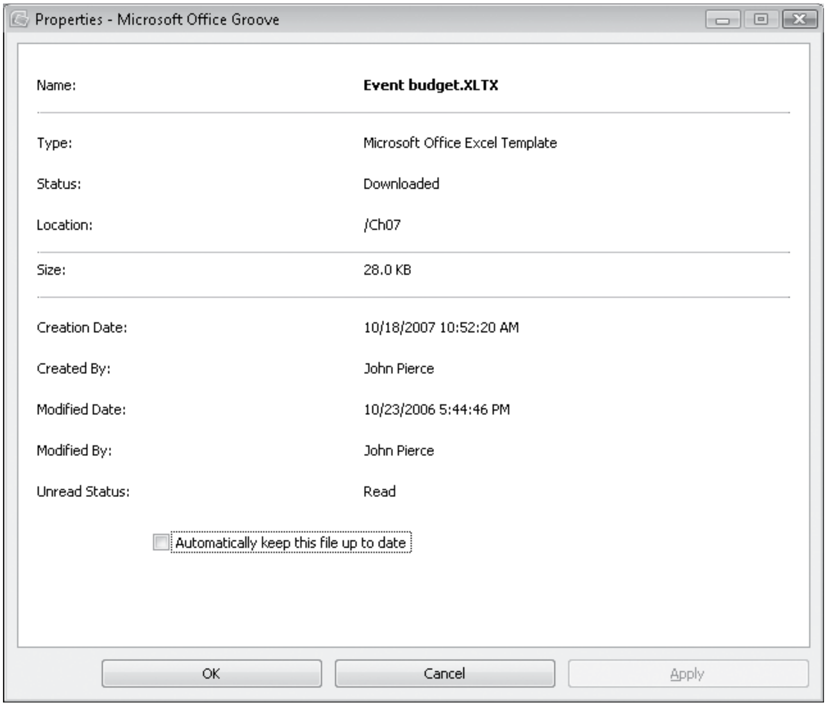
USE the Groove 2007 SBS file sharing workspace you created earlier in this chapter. Also use the *Event budget* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\GrooveFiles* folder.

OPEN the Groove 2007 SBS workspace before beginning this exercise.

1. In the **File and Folder Tasks** task pane, click **Edit This Folder's Download Settings**.
2. In the **Properties** dialog box, click **Manual Download**, and then click **OK**.

3. In the *2007OfficeSBS* folder, open the *GrooveFiles* folder, and then click the *Event budget* file.
4. In the **File and Folder Tasks** task pane, click **Show this file's properties**.

   Groove displays the Properties dialog box for the file.



5. Select the **Automatically keep this file up to date** check box, and then click **OK**.
6. In the **File and Folder Tasks** task pane, click **Set Alerts for this file**.
7. Move the slider to set the alert level to **High**, and then click **OK**.

CLOSE the Groove 2007 SBS workspace, and exit Groove.

Tip To stop synchronization while you are using a file sharing workspace, click Stop Synchronizing <*file sharing workspace name*> in the Synchronization Tasks task pane. This action affects only the computer on which you select the option. If you want to stop synchronization for the workspace on all computers on which you have your account, you need to delete the workspace.

Key Points

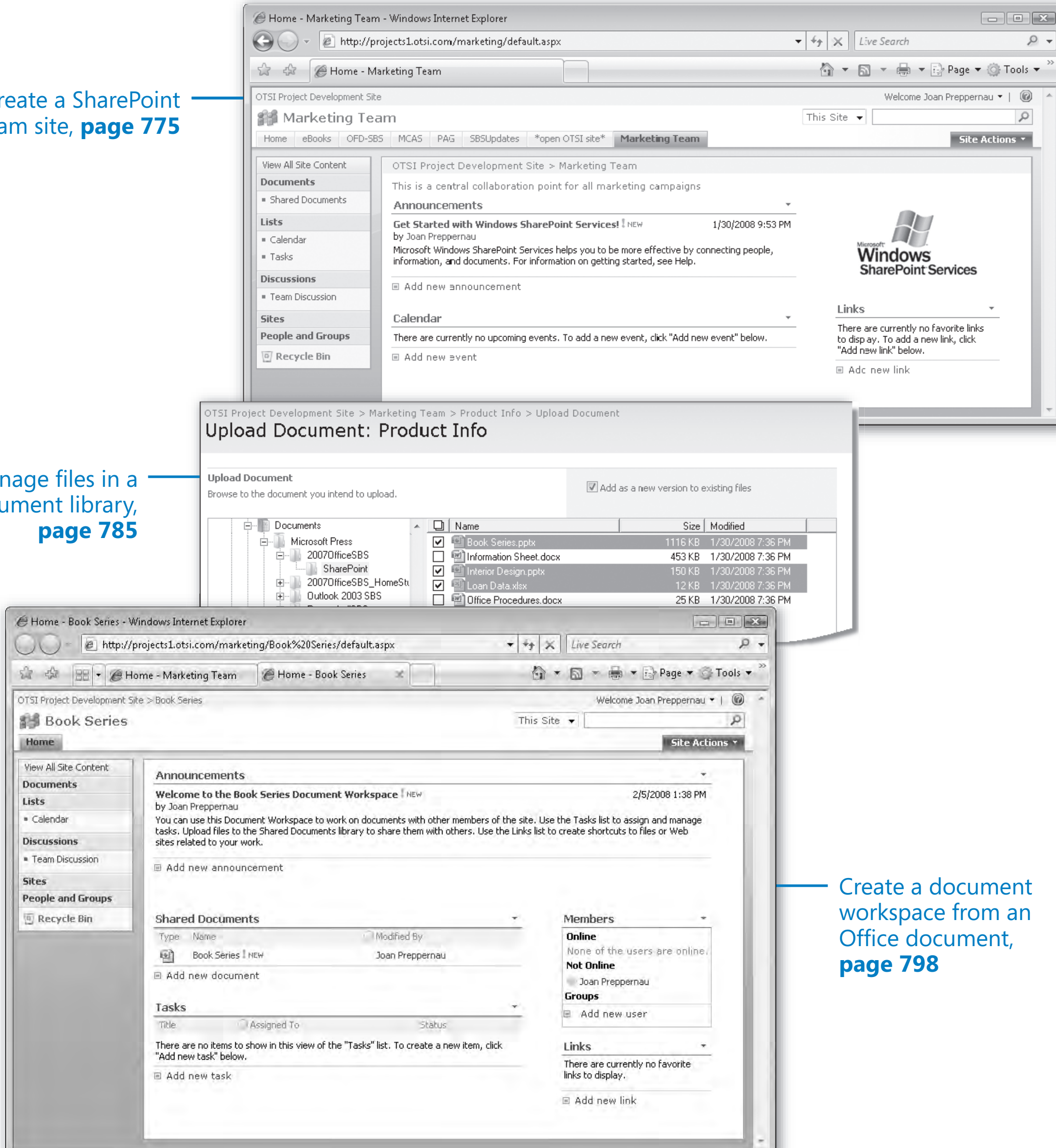
- You can manage and share files by using the Files tool in a standard workspace or by setting up a file sharing workspace.
- Right-click a file in the Files tool to open, edit, copy or paste, or print the file. The shortcut menu provides various actions you can perform on a file.
- You can designate an existing folder on your computer as a file sharing workspace or set up a new folder to use for this purpose.
- Whether you are using the Files tool or a file sharing workspace, you can control permissions.

Part IX
Collaboration

Chapter at a Glance

Create a SharePoint team site, **page 775**

Manage files in a document library, **page 785**



Create a document workspace from an Office document, **page 798**

Create a document workspace from Outlook, **page 805**

27 Enabling Collaboration by Using SharePoint

In this chapter, you will learn to:

- ✔ Create a SharePoint team site.
- ✔ Create a document library.
- ✔ Manage files in a document library.
- ✔ Check files into and out of a document library.
- ✔ Create a custom list from an Excel workbook.
- ✔ Work with SharePoint list data in Access.
- ✔ Create a document workspace from an Office document.
- ✔ Create a document workspace from Outlook.
- ✔ Work offline with document library contents.
- ✔ Link a SharePoint calendar to Outlook.

Smart client programs, such as those in the 2007 Microsoft Office system, can easily be integrated with Microsoft SharePoint products and technologies. For example, Microsoft Office Access, Microsoft Office Excel, Microsoft Office InfoPath, Microsoft Office OneNote, Microsoft Office Outlook, Microsoft Office PowerPoint, Microsoft Office Project, and Microsoft Office Word can all work with information stored on SharePoint sites. While working in Word 2007, PowerPoint 2007, or Excel 2007, users can interact with Windows SharePoint Services to create workspaces, post and edit documents, and assign tasks on SharePoint sites. In Outlook 2007, users can view calendars and contact lists stored on SharePoint sites and can create and manage sites for organizing meetings.

The programs in the 2007 Office system are designed to interact seamlessly with SharePoint products and technologies. By using the collaboration technology provided by a SharePoint site, members of your team or organization can do the following:

- Store and share information created in desktop programs such as Word, Excel, and PowerPoint.
- Make Access databases available for data entry and reporting purposes.
- Create online forms in InfoPath and collect the data entered in the forms.
- Access and work with the information stored on the site through Outlook, even when you're offline.

In this chapter, you will create a SharePoint site for storing, sharing, and collaborating on documents, workbooks, presentations, databases, and other items you create by using applications in the 2007 Office system. You will add files to a document library, edit files, and remove files. You will also work with lists and document workspaces.

SharePoint Products and Technologies

Microsoft SharePoint products and technologies provide a framework within which organizations of all sizes can create information-storage systems appropriate to their needs. Current SharePoint products and technologies include:

- **Microsoft Windows SharePoint Services 3.0.** Enables collaboration through a secure SharePoint site on which organizations of all sizes can manage content and share information.
- **Microsoft Office SharePoint Server Standard Edition.** Builds on Windows SharePoint Services to provide personalized portals, enterprise search capability, and enterprise-level management of documents, records, and Web content.
- **Microsoft Office SharePoint Server Enterprise Edition.** Includes all the features of the Standard Edition, plus the ability to manage business processes through automated workflows and electronic forms, and to collect and analyze business intelligence data.

Your organization might run Office SharePoint Server internally or might employ the services of a SharePoint hosting company. The latter solution is ideal for organizations that don't have either the space or the technical personnel to support a full-scale server installation. A variety of hosted SharePoint solutions are available through the Internet. You can easily have a site up and running in a couple of hours—the most time-consuming part of the process is the assignment of the DNS entries.

See Also Do you need only a quick refresher on the topics in this chapter? See the Quick Reference section at the beginning of this book.

Important Before you can use the practice files in this chapter, you need to install them from the book's companion CD to their default location. See "Using the Companion CD" at the beginning of this book for more information.

Important To complete the exercises in this chapter, you must have access to an existing SharePoint site. Some of the exercises require that you have administrative permissions. The exercise steps are written for sites built on Windows SharePoint Services 3.0.

Creating a SharePoint Team Site

The creation and management of a primary SharePoint site is the job of a system administrator and is beyond the scope of this chapter. However, you might want or need to create sites within that primary site for the purpose of managing content created in Office programs. Provided you have permission to create sites and workspaces, you can easily add new sites and workspaces to your organization's primary SharePoint site.

See Also For information about SharePoint permissions, permission levels, and site groups, visit ***office.microsoft.com/en-us/sharepointtechnology/HA101001491033.aspx***.

The most common type of site for document management and collaboration is a ***team site***. The basic team site template includes:

- **Shared Documents library.** Share a document with the team by adding it to this document library.
- **Calendar.** Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events.
- **Tasks list.** Use the Tasks list to keep track of work that you or your team needs to complete.
- **Announcements list.** Use the Announcements list to post messages on the home page of your site.
- **Links list.** Use the Links list for links to Web pages that your team members will find interesting or useful.
- **Team Discussion list.** Use the Team Discussion list to hold newsgroup-style discussions on topics relevant to your team.

In this exercise, you will create a SharePoint team site, as a subsite of an existing site, for use in the rest of the chapter. There are no practice files for this exercise.

Troubleshooting This exercise requires that you have permission to create sites and workspaces on an existing SharePoint site.

BE SURE TO display the primary SharePoint site before beginning this exercise.

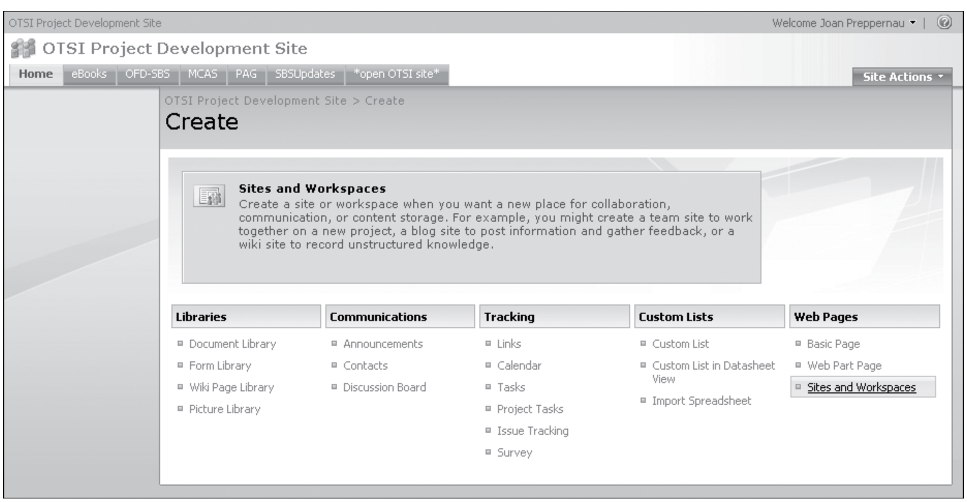
1. Display the site under which you want to create your new site.
2. On the **Site Actions** menu, click **Create**.

   Troubleshooting As a security measure, SharePoint allows each site user to see only the actions he or she has permission to perform. The Site Actions menu is visible only if you have permission to create sites, create pages, edit pages, or manage site settings. The menu you see includes only the actions you are allowed to perform.

   The Create page opens. From this page, you can create various types of document libraries, lists, surveys, and Web pages.

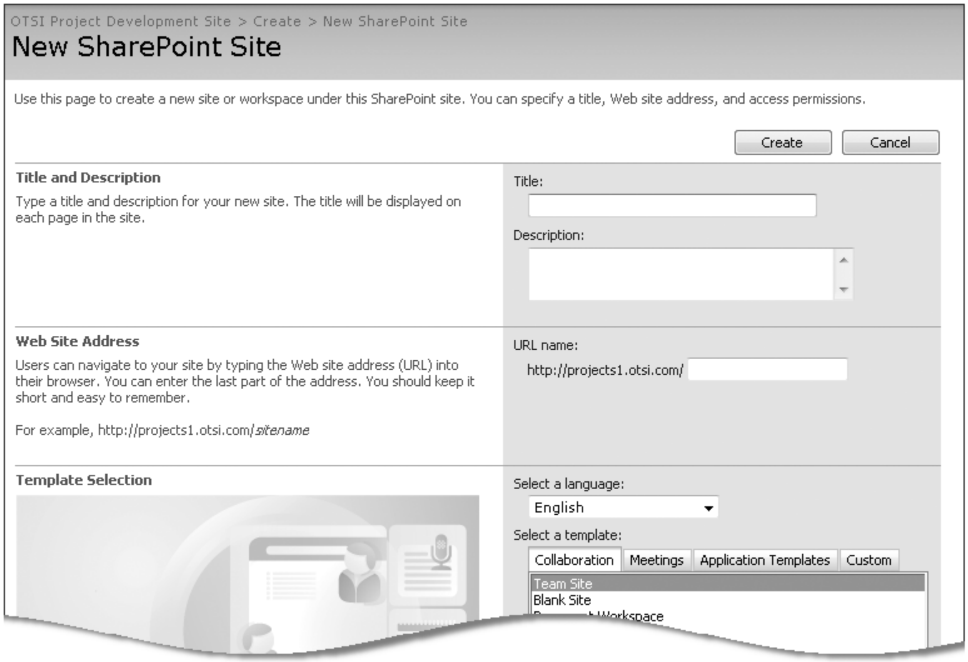
3. Point to a few of the elements that interest you.

   A description of the element appears at the top of the Create page.



4. In the **Web Pages** list, click **Sites and Workspaces**.

   The New SharePoint Site page opens.

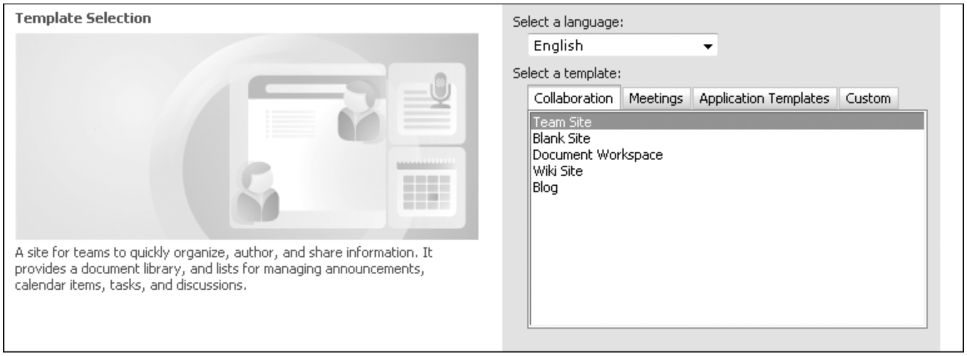


5. In the **Title and Description** area, type Marketing Team in the **Title** box and This is a central collaboration point for all marketing campaigns in the **Description** box.

6. In the **Web Site Address** area, type marketing in the **URL name** box.

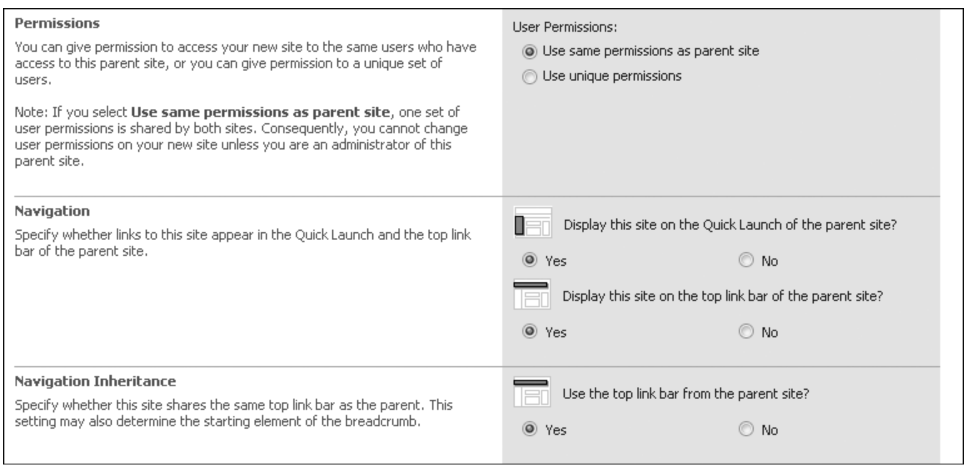
> **Important** The name you type here is added to the end of the parent site's Web address. After creating the site, you can change the title and description, but you can't change the URL without deleting and re-creating the site. So take care when choosing the URL.

7. Scroll the page if necessary. In the **Template Selection** area, click each tab to see the available site and workspace templates. Then click the **Collaboration** tab, and in the **Select a template** list, click **Team Site**.



The available templates vary based on how the Windows SharePoint Services technology is installed. The wide variety of pre-built templates will fit most needs, but custom templates can also appear in this list. Notice the new Wiki Site and Blog templates.

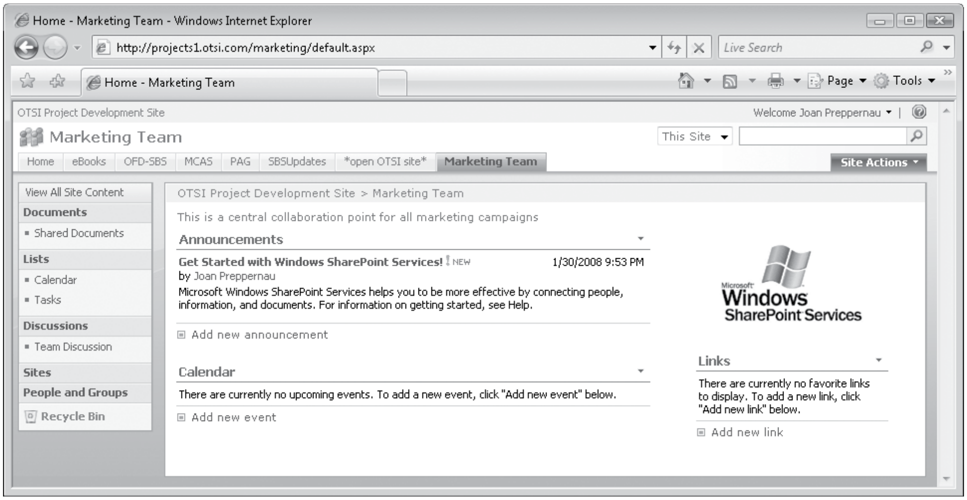
8. In the **Permissions**, **Navigation**, and **Navigation Inheritance** areas, leave the default options selected.



9. At the top or bottom of the **New SharePoint Site** page, click **Create**.

> **Tip** If you were to select the Use Unique Permissions option in step 8, you would now be asked to set up groups for the visitors, members, and owners of the new site.

SharePoint displays the new Marketing Team site.



We'll take a closer look at the elements of this site in the next exercise.

BE SURE TO leave the site open for use in the next exercise.

Creating a Document Library

You can create two types of storage containers on a SharePoint site: *lists* in which you store information, and *libraries*, in which you store content. You create lists and libraries from templates—either those supplied with SharePoint or templates created or customized by other people. You can use the template-based lists and libraries in their default form, modify them to fit your needs, or create your own.

A SharePoint team site based on the default template includes three categories of lists:

- **Communications.** Lists in which to share information, including Announcements, Contacts, and a Discussion Board
- **Tracking.** Lists in which to track information, including Links, Calendar, Tasks, Project Tasks, Issue Tracking, and Survey
- **Custom.** Lists you create from scratch or from an imported Excel workbook

SharePoint offers many types of libraries designed to contain specific content. Templates provided with a standard SharePoint team site include:

- Document Library
- Form Library
- Picture Library
- Wiki Page Library

Other available templates include Data Connection Library, Slide Library, and Translation Management Library. The most common type of list or library that you will use when working with Office documents is a ***document library***.

You can apply individual attributes to each ***content library*** you create; for example, you can specify the default type for new documents or override the site's version control settings.

> **Tip** Contributor rights are required for some site actions, but even an invited member can create new site elements. As a result, the Windows SharePoint Services technology provides the basis for a very collaborative environment.

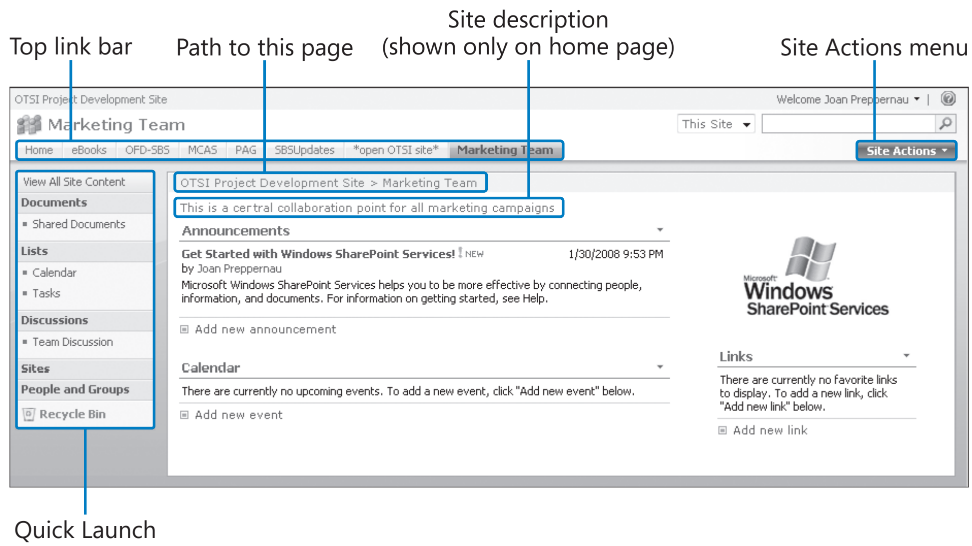
An important feature of SharePoint, and one of the reasons it is a good choice for a file-storage and collaboration tool, is its support of file ***versioning***. If you turn on versioning for a library or list, SharePoint creates a copy of the file each time you save it. Each copy is assigned a version number. You can view the version history of a file and from there, open or revert to a previous version. Each version of the file requires storage space; if you work with large files or large numbers of files, or if you save many versions of each file in a document library, you might want to limit the number of versions SharePoint keeps for that library.

> **Important** File versioning is not turned on by default; you must turn it on for a particular list or library or for the template on which a type of list or library is based.

In this exercise, you will view the existing storage structure of a SharePoint site, create a document library, turn on version control for the document library, and change the number of versions retained by SharePoint.

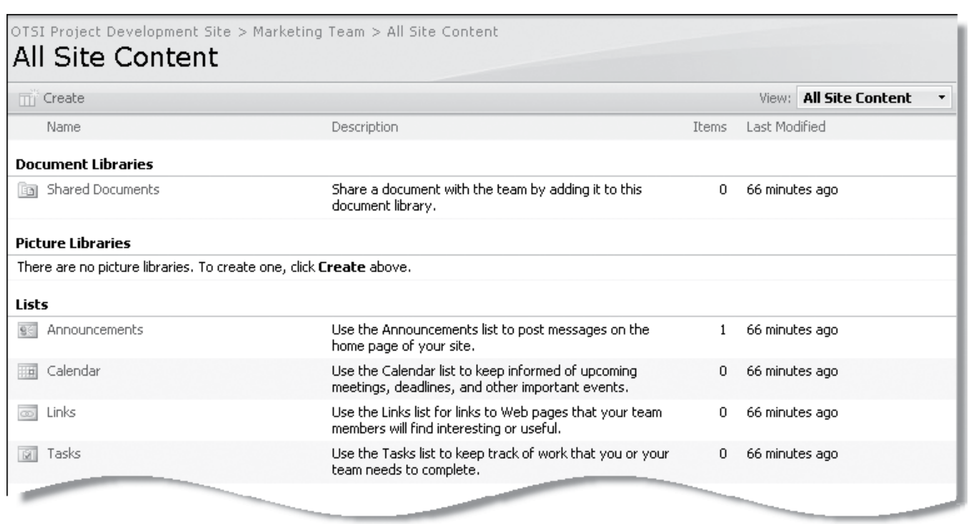
USE the Marketing Team site you created in the previous exercise.

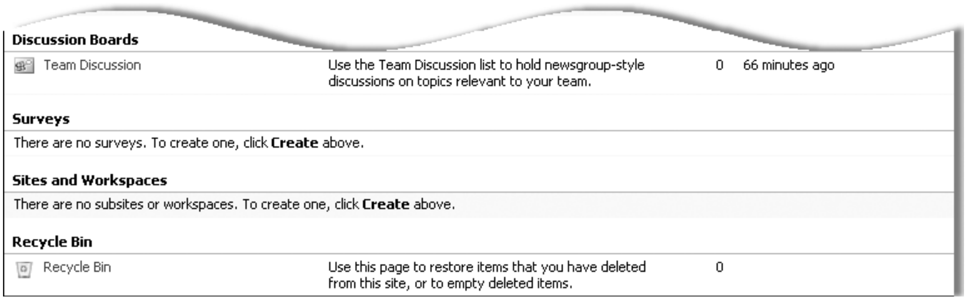
1. Display the Marketing Team site.



2. On the **Quick Launch**, click **View All Site Content**.

   The All Site Content page provides access to all document and picture libraries, lists, surveys, sites, and workspaces linked to the site, as well as access to the Recycle Bin. Links to these items might also be available from the Quick Launch if that option was selected when creating the item.





3. Scroll the **All Site Content** page to review the entire site structure. Then at the top of the page, click **Create**.

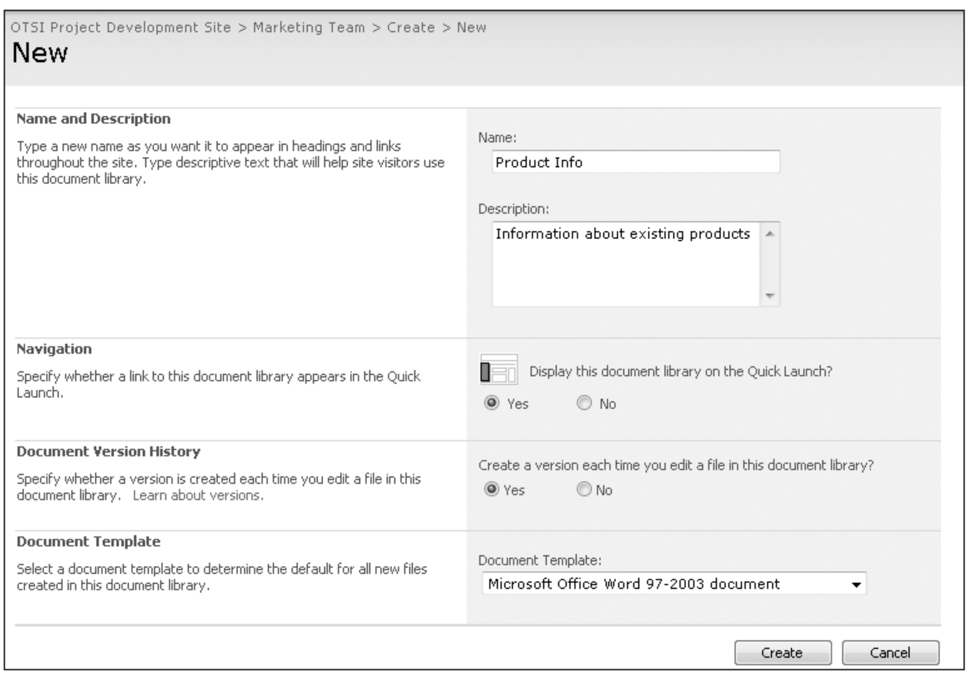
   The Create page opens.

4. In the **Libraries** list, click **Document Library**.

   The New page opens.

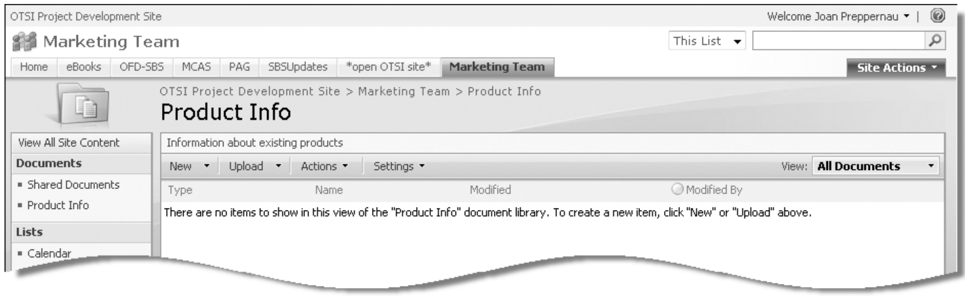
5. In the **Name** box, type **Product Info**, and in the **Description** box, type **Information about existing products**.

6. Retain the **Navigation** setting to display the document library on the Quick Launch. Then in the **Document Version History** area, click **Yes**.



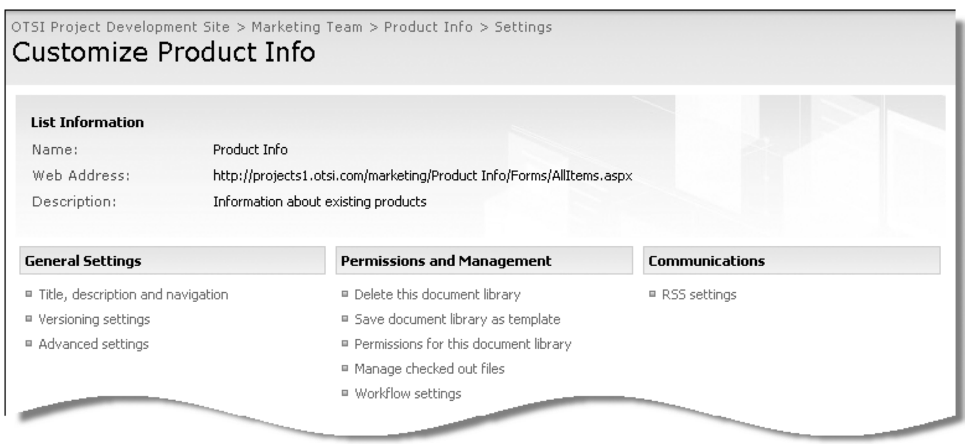
7. At the bottom of the **New** page, click **Create**.

   The Product Info document library opens, ready for you to add documents to it. It also appears on the Quick Launch, so you can open it directly from any other page of the site.



8. In the **Settings** list, click **Document Library Settings**.

   The Customize Product Info page opens. From this page, you can manage the document library, files, and workflow settings, and make changes to the general settings, permissions, communications, columns, and views of the selected document library.



> **Tip** Changes you make on this page affect only the current document library, not the entire site. You might want to explore the options on this page on your own.

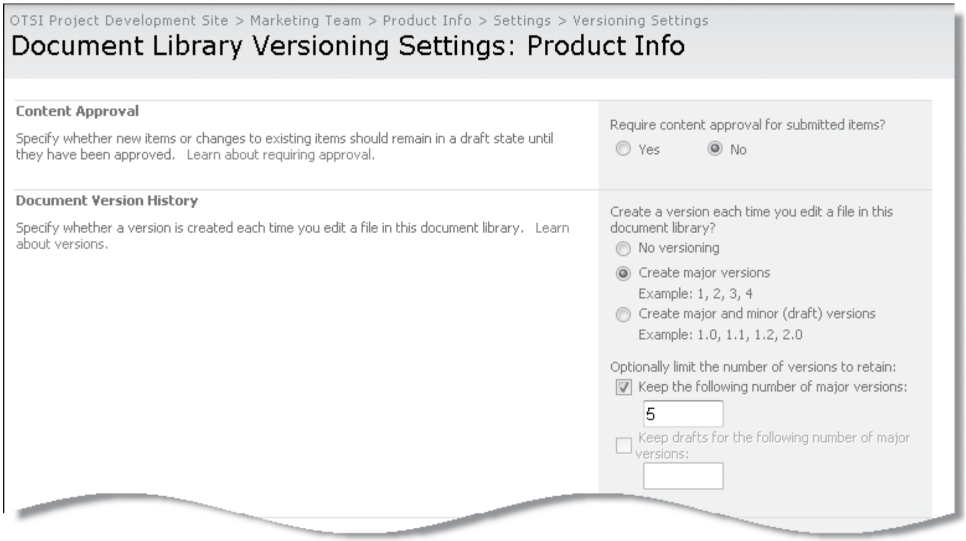
9. In the **General Settings** list, click **Versioning settings**.

   The Document Library Versioning Settings page for the Product Info document library opens. From this page, you can specify whether new and changed documents must be approved by a specific person before they are available from the site, whether SharePoint retains prior versions of updated documents, whether site users can see draft documents that haven't been declared final, whether users must check out documents before editing them, and whether users can create multiple types of content from the New menu. Each of these options is useful when developing content in a collaborative environment.

> **Tip** The Content Approval option is part of the new Windows Workflow Foundation functionality. If you use Microsoft Office SharePoint Designer 2007 to create and manage SharePoint sites, you can attach workflows to document libraries and lists. These workflows monitor events and conditions within the library or list and then take action, such as routing a file for approval or sending an e-mail message.

10. In the **Document Version History** area, select the **Keep the following number of major version** check box. Then in the box below, enter 5.

You can select the version options that fit best with the expected frequency of document updates. You can also specify how many previous versions of a document should be retained.



11. At the bottom of the **Document Library Versioning Settings** page, click **OK** to return to the page.
12. In the path at the top of the **Customize Product Info** page, click **Product Info** to return to the document library.

BE SURE TO leave the document library open for use in the next exercise.

Managing Files in a Document Library

You can add almost any type of file to a document library for the purpose of storing or sharing the file. Depending on the restrictions set by the site administrator, it might not be possible to add executable files or other types of files deemed possibly dangerous.

> **Tip** If you want to add a file of a restricted type that you know is not a security hazard, rename the file with a different file extension, such as .txt, and then upload it. This will prevent it from being executable, thus working around the problem.

Document libraries can contain folders as well as files. Just as you can set permissions for a document, you can set permissions at the folder level. For example, you might want to restrict access to a folder containing sensitive financial data.

To create a folder in a document library:

1. Display the document library, and then in the **New** list, click **New Folder**.
2. On the **New Folder** page, enter a folder name in the **Name** box.
3. At the top or bottom of the **New Folder** page, click **OK**.

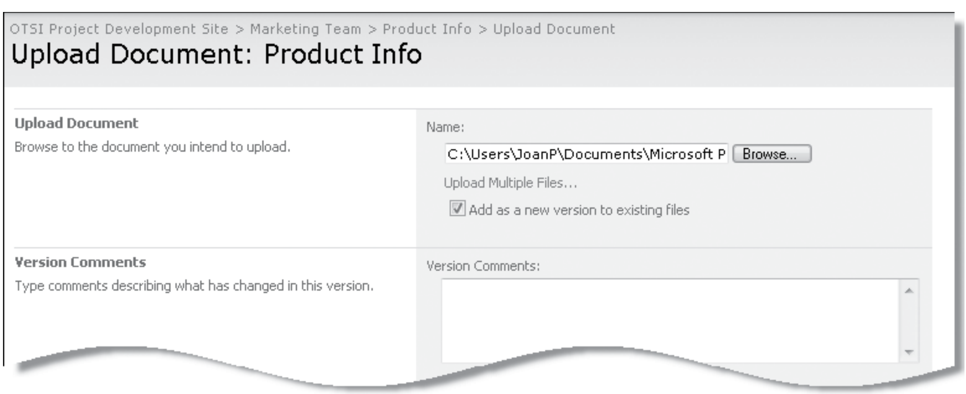
You can add documents to the folder the same way you add them to a top-level content library.

In this exercise, you will upload first one document and then multiple documents to a document library. Then you will delete a file from the document library.

USE the Product Info document library you created in the previous exercise, and the practice files located in the *Documents\Microsoft Press\2007OfficeSBS\SharePoint* folder.

1. Display the Product Info document library.
2. In the **Upload** list, click **Upload Document**.

   The Upload Document page for the current document library opens.
3. In the **Upload Document** area, click the **Browse** button.
4. In the **Choose file** dialog box displaying the contents of your *Documents* folder, navigate to the *Documents\Microsoft Press\2007OfficeSBS\SharePoint* folder, click the *Information Sheet* document, and then click **Open**.



5. At the bottom of the **Upload Document** page, click **OK**.

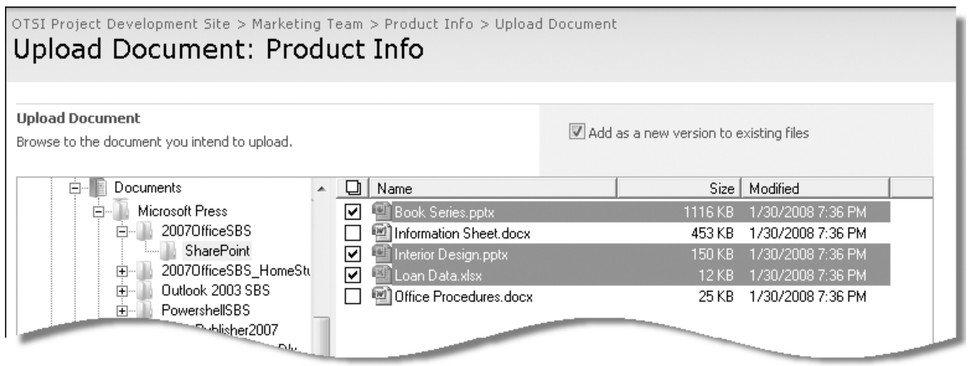
   SharePoint adds the selected file to the Product Info document library.

6. Click the **Upload** arrow, and then in the list, click **Upload Multiple Documents**.

   A different version of the Upload Document page opens.

7. In the left pane, navigate to the *Documents\Microsoft Press\2007OfficeSBS\SharePoint* folder, which is a subfolder of your personal folder.

8. In the right pane, select the check boxes for the *Book Series* and *Interior Design* presentations and the *Loan Data* workbook.



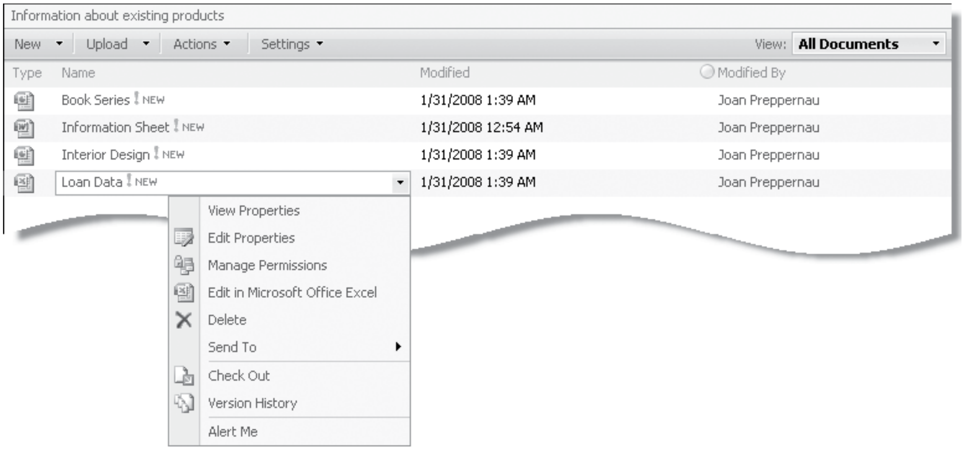
Tip You can select all the files in a folder by clicking the double check box located in the check box column header.

9. At the bottom of the **Upload Document** page, click **OK**. Then in the Internet Explorer message box prompting you to confirm the upload, click **Yes**.

   SharePoint adds the selected files to the Product Info document library. The *Loan Data* workbook does not belong with product information.

10. Point to the *Loan Data* file name, and then click the arrow that appears.

    A file-specific Edit menu opens. This menu is similar to the context menu you see when you right-click a file in Windows Explorer.



11. On the **Edit** menu, click **Delete**. Then in the **Windows Internet Explorer** message box asking you to confirm the deletion, click **OK**.

    SharePoint removes the workbook from the document library.

BE SURE TO leave the document library open for use in the next exercise.

Checking Files Into and Out of a Document Library

You can view a document that is stored on a SharePoint site by clicking the file name or icon to open the file in the default program for that file type. It is not possible to make changes to the open file without first specifically choosing to edit it.

You can edit a document stored in a document library in three ways:

- Check out the file, edit it, and then check it back in, entering comments to be saved as part of the version history.
- Open a read-write version of the file for editing, edit it, and then save your changes. This process saves your changes and creates a new version of the document, but it doesn't protect your version of the document while you are editing it.
- Open a read-only version of the file, click the Edit Document (or Edit Presentation, Edit Workbook, and so on) button that appears below the Ribbon, edit the document, and then save your changes. This method has the same result as the second method.

When you check out a file, you have the option of saving a copy of the file to your local *SharePoint Drafts* folder. SharePoint creates this folder in your *Documents* folder the first time you need it. If you use this option, you can edit the checked-out file while online or offline. This is not only convenient for mobile workers, but also a good fail-safe in the event that the SharePoint site should experience a problem.

> **Tip** To be truly certain that you have a current copy of a file on your computer in case of a problem with the SharePoint site, you can save a local copy of the file in a working directory that you create that is not linked to SharePoint. First check out the file, then on the file Edit menu, point to Send To, and click Download A Copy. In the File Download message box, click Save. Then in the Save As dialog box, navigate to the folder where you want to save the file, and click Save.

In this exercise, you will check out a file, edit it, check it back in, and then open a read-only version to view your changes.

USE the Product Info document library you modified in the previous exercise.

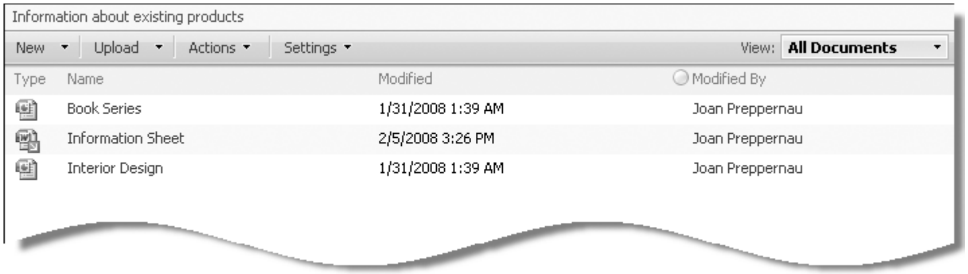
1. Display the Product Info document library.
2. Point to the *Information Sheet* file name, click the arrow that appears, and then on the **Edit** menu, click **Check Out**.

   When you check out a document, you can choose to work with an online or offline copy.

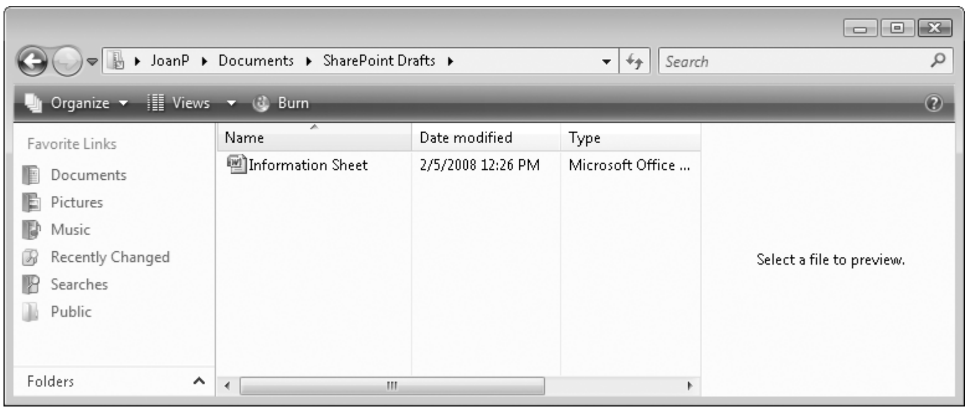
3. In the **Microsoft Internet Explorer** message box, select the **Use my local drafts folder** check box if it isn't already selected, and then click **OK**.

   The document is now checked out to you, as indicated by the small green and white arrow overlaid on the document icon. Other users will not be able to make changes to the document until you check it back in.



4. On the **Start** menu, click **Documents**, and then open the *SharePoint Drafts* folder.

   The folder contains the *Information Sheet* document.



> **Tip** If you display hidden files, you will see that the folder also contains a *_private* subfolder.

5. In the *SharePoint Drafts* folder, double-click the *Information Sheet* file.

> **Tip** You can open the checked-out file either from the *SharePoint Drafts* folder or from the document library. To open a file from the document library, click the file name once; or point to the file, click the arrow that appears to the right of the document name, and then click Edit In Microsoft Office Word.

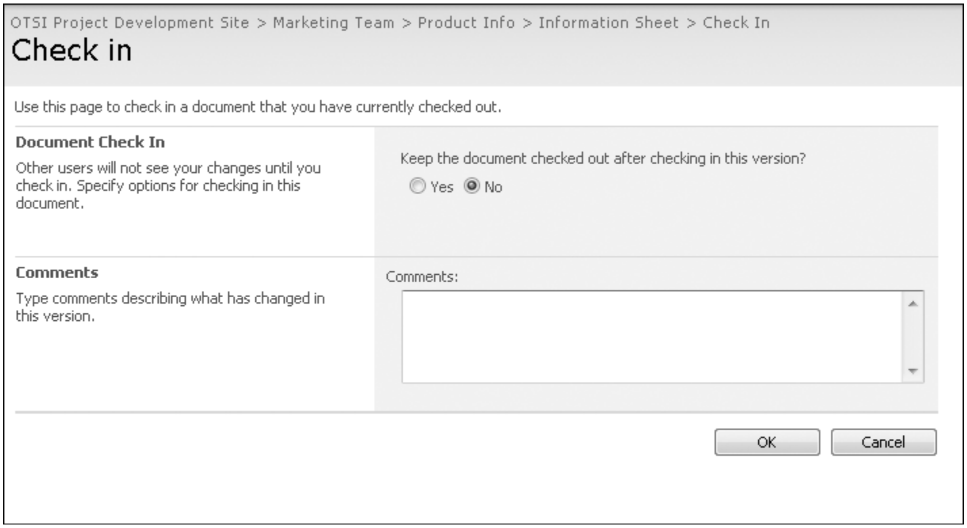
6. In the **Microsoft Internet Explorer** message box asking you to confirm that you want to open the file, click **OK**.

   Word starts, if it isn't already running, and displays the selected document.

7. Scroll down to display the *Keys to On-Going Success* heading at the top of the second page.

8. Select the word **On-Going**, and then type **Ongoing**.
9. Close the document. In the **Microsoft Office Word** message box asking whether to save your change, click **Yes**. Then in the **Microsoft Office Word** message box asking whether to check in the file, click **Yes**.

   The Check In dialog box opens.



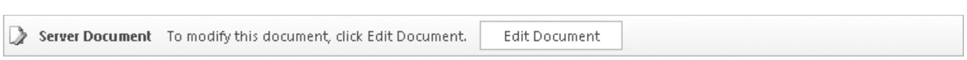
10. In the **Comments** box, type **Corrected spelling error**. Then click **OK**.

> **Tip** You have the option of checking in the current version and then checking it out again. If you intend to continue working with the document, using this option ensures that updated document content is available to site users while you are still developing the final content.

11. If necessary, close the Word program window and display the Product Info document library.

    The document library indicates that the file is no longer checked out and shows the modification date and time. Your site user name identifies you as the person who most recently modified the document.
12. Click the *Information Sheet* file name or icon to open the file in Word.

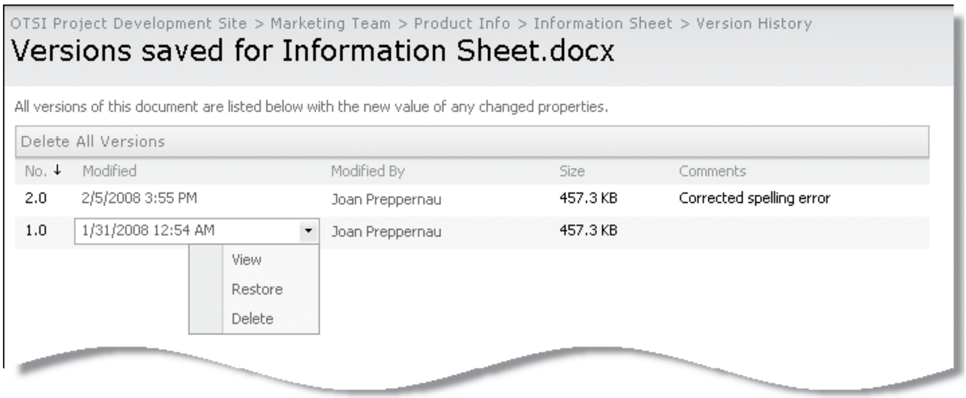
    The presence of the Edit Document button on the security bar at the top of the content pane indicates that this is a read-only version of the file.



13. Scroll to the modified heading to verify that your change is present. Then close the document.
14. In the document library, point to the *Information Sheet* file name, click the arrow that appears, and then on the **Edit** menu, click **Version History**.

    The Version History page opens. Two versions of the file are available.
15. Point to version **1.0**, and then click the arrow that appears.

    A menu of actions you can take with the original file appears.



16. On the **Edit** menu, click **Restore**. Then in the **Windows Internet Explorer** message box asking you to confirm that you want to replace the current file with this version, click **Yes**.
17. In the Product Info document library, click the *Information Sheet* file name to open a read-only version of the file. Then display the second page.

    The original heading text (including the hyphenated word *On-Going*) indicates that this is the original version of the file.

CLOSE the *Information Sheet* document.

BE SURE TO leave the document library open for use in the next exercise.

Creating a Custom List from an Excel Workbook

Windows SharePoint Services 3.0 and Office SharePoint Server 2007 support larger, more versatile lists than previous versions of SharePoint. If you want to make information from an Excel worksheet conveniently available to team members as a SharePoint

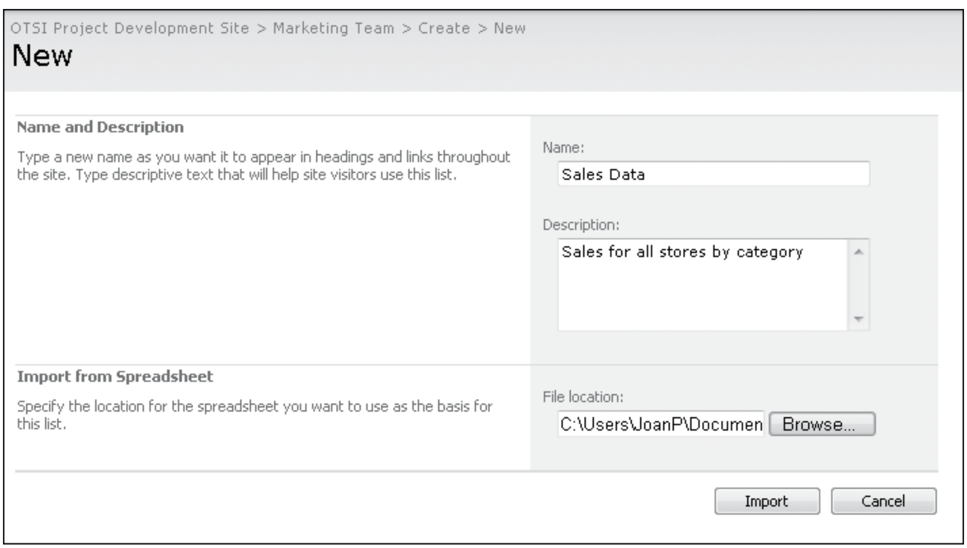
list, you don't have to retype all the worksheet data into the list. You can create a custom SharePoint list by importing the worksheet contents, or a subset of it.

In this exercise, you will import data from an Excel workbook as a SharePoint list.

USE the Marketing Team site you created earlier in this chapter, and the *SalesData* workbook. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\SharePoint* folder.

1. Display the Marketing Team site. On the **Site Actions** menu, click **Create**.
2. On the **Create** page, in the **Custom Lists** list, click **Import Spreadsheet**.

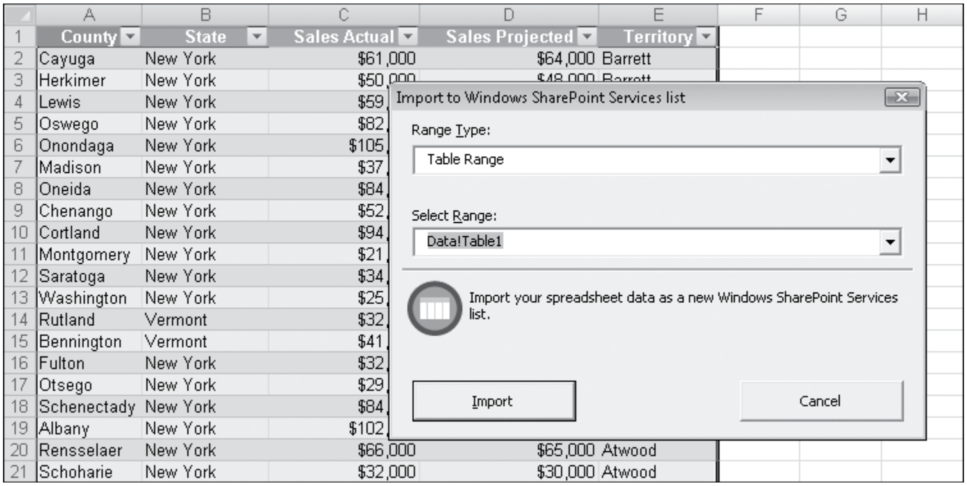
   The New page opens.
3. In the **Name and Description** area, type **Sales Data** in the **Name** box and **Sales for all stores by category** in the **Description** box.
4. In the **Import from Spreadsheet** area, click the **Browse** button.
5. In the **Choose file** dialog box, navigate to the *Documents\Microsoft Press\2007OfficeSBS\SharePoint* folder, click the *SalesData* workbook, and then click **Open**.



6. At the bottom of the **New** page, click **Import**.

   The selected workbook opens in Excel, and the Import To Windows SharePoint Services List dialog box opens.
7. In the **Select Range** list, click **Data!Table1**.

Excel selects the table on the Data worksheet.



8. In the **Import to Windows SharePoint Services list** dialog box, click **Import**.

   SharePoint imports the selected data into the newly created Sales Data page, with the structure intact.

BE SURE TO leave the document library open for use in the next exercise.

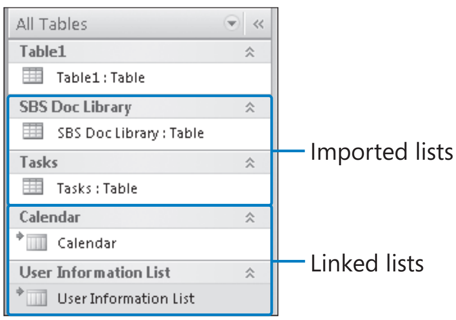
Working with SharePoint List Data in Access

You can work with content from SharePoint lists in Access just as you can with standard database content. You can bring a list into Access in either of two ways: by importing or by linking.

Importing a SharePoint list creates a copy of the list in the destination Access database. During the import operation, you can specify the lists that you want to copy, and, for each selected list, you can specify whether you want to import the entire list or only a specific view. The import operation creates a table in Access and then copies the columns and items from the source list (or view) into that table as fields and records. Changes made to the imported data in Access will not be replicated in SharePoint, and vice versa.

If you're likely to import the list again—for example, to update the data stored in Access—you can save the import parameters. To repeat the saved import process, click the Saved Imports button in the Import group on the External Data tab, select the import specification you want, and then click Run.

If you want to work with data from a SharePoint list in Access but keep the information in both locations current, create a linked table. The Get External Data wizard guides you through the process; on the second page of the wizard, you select whether to import or link to the list. Linked tables are indicated in the Access Navigation Pane by a blue arrow pointing to a yellow table. Information you update in Access is replicated in the SharePoint list when you refresh the view, and vice versa.



After you import or link to a list, you should open the resulting table in Datasheet view to ensure that all of the fields and records were imported and that there are no errors. You can review the data type and other field properties by switching to Design view.

You can import multiple lists in one import operation, but you can import only one view of each list. If one of the standard views doesn't fit your needs, create a custom view containing only the fields and list items you want before starting the import process.

To import or link a SharePoint list to an Access database:

1. On the SharePoint site, identify the list you want to import, and decide whether you want the entire list or just a particular view.

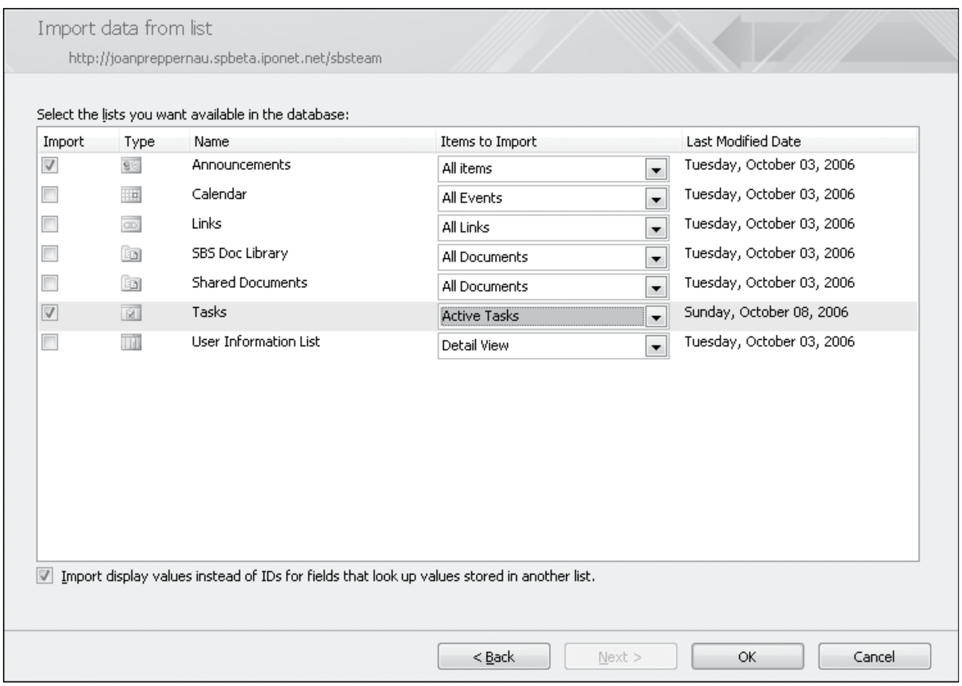
2. Open the Access database you want to import or link the list to. Then on the **External Data** tab, in the **Import** group, click the **SharePoint List** button.

   The Get External Data wizard starts and displays a list of known sites. (You are not limited to this list.)

3. On the **Select the source and destination of the data** page, in the **Specify a SharePoint site** area, click the address of the site you want to connect to, or type it in the box below.
4. Click **Import the source data** or **Link to the data source**, and click **Next**. Then, if prompted to do so, enter your site credentials.

   The Import Data From List page displays all the lists available on the selected SharePoint site.
5. In the **Import** column, select the check box of each list you want to import into the database.
6. In the **Items to Import** column, for each of the selected lists, select the view (arrangement of data) that you want to import into the database.

> **Troubleshooting** If the Items To Import list does not include a list box for the SharePoint list you are importing, click in the column where the list box should be, and it will appear.



7. With the **Import display values instead of IDs for fields that look up values stored in another list** check box selected, click **OK**.

   This option controls which data is imported for lookup columns in the selected lists.

No progress bar appears while Access imports the lists, and this process could take some time. Resist clicking the OK button more than once. When the import process is complete, the last page of the wizard appears.

8. If you want to save the import parameters for reuse, select the **Save import steps** check box. On the **Save Import Steps** page, enter a name and description for the specification, and then click **Save Import**.

> **Tip** If you use Outlook 2007, you can place a task corresponding to the saved import specification on your calendar by selecting the Create Outlook Task check box.

Access creates a table with the same name as the source list. If that name is already in use, Access appends a number to the new table name—for example, Contacts1. (If Contacts1 is also already in use, Access creates Contacts2, and so on.) Access will never overwrite a table in the destination database or append the contents of a list or view to an existing table.

Customizing Site, Library, and List Views

By default, the Standard View of a document library displays the following information for each file:

- Type (represented by the file icon)
- File name
- Date and time the file was last checked in or out
- The site user who most recently checked in the file

These are only a few of the properties associated with each file. You can display other standard properties and helpful information, such as who a file is checked out to, comments from the most recent file check-in, file size, document title, and version number. You can display non-standard information by creating your own columns in which to track, save, or calculate information. You can save custom columns for site-wide use.

After selecting the information you want to display, you can specify the order in which it appears on the page. You can customize the display of information for all people who view a document library or create a personal view for your own use.

An in-depth discussion of columns and views is beyond the scope of this chapter. You can find additional information in *Microsoft Windows SharePoint Services 3.0 Step by Step* by Olga Londer, Bill English, Todd Bleeker, and Penelope Coventry (Microsoft Press, 2007).

Creating a Document Workspace from an Office Document

A document workspace is similar to a document library, but it is created for a specific file. As with files in a document library, the file can be checked out by any site member with permissions to the document workspace. While the file is checked out, other people can view it but cannot edit it.

You can publish a file to a document workspace from Word, Excel, or PowerPoint. The process of publishing creates the workspace and stores a copy of the document there so that other people can work on it. When you open the document stored on your computer, the program asks whether you want to download updates from the document workspace and provides a Document Management task pane with tools you can use to keep your copy synchronized with the copy stored in the document workspace.

When the document workspace is created and the document has been saved in the space, the Document Management task pane reappears with the name of the workspace at the top and five tabs that show information from the workspace.

From this task pane, you can do the following:

- Download changes that have been made to the copy of the document stored in the workspace by clicking Get Updates at the bottom of the task pane.
- Set options associated with the site by clicking Options.
- Display the members of this workspace by clicking the Members tab. You can add members by clicking Add New Members below the list box. You can also send an e-mail message directly to members from the task pane.
- Display a list of outstanding tasks associated with the document by clicking the Tasks tab. You can add tasks by clicking Add New Task below the list box. Clicking Alert Me About Tasks displays the New Alert page of the document workspace, where you can specify that you want to be alerted when the tasks associated with the document change.

  > **Tip** If your organization uses workflow technology and a workflow has been set up for this document, you can click View Workflow Tasks to get information about your tasks.

- Display a list of all documents in this workspace by clicking the Documents tab. You can add a new document by clicking Add New Document below the list box. To create a new folder in which to store documents, click Add New Folder. To be alerted when documents are added or changed, click Alert Me About Documents.

- Display a list of links to auxiliary materials associated with the document by clicking the Links tab. You can add a new link by clicking Add New Link below the list box and be alerted when links are added or changed by clicking Alert Me About Links.
- Open the document workspace in your Web browser by clicking Open Site In Browser below the workspace name at the top of the task pane. (You might have to enter your site credentials.) Any members, tasks, documents, and links you add while the workspace is displayed in your Web browser will be reflected in the Document Management task pane.

After the file content is declared final, you can move the file to a more permanent storage location and delete its document workspace.

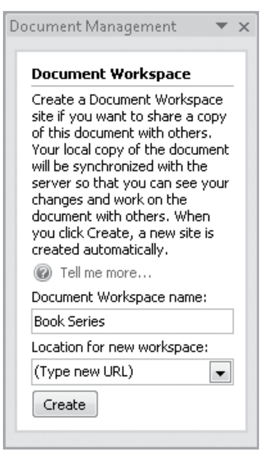
In this exercise, you will publish a presentation to a document workspace, explore the Document Management task pane, view the document workspace, and then delete it.

> **USE** the Marketing Team site you created earlier in this chapter, and the *Book Series* presentation. This practice file is located in the *Documents\Microsoft Press\2007OfficeSBS\SharePoint* folder.
>
> **OPEN** the *Book Series* presentation in PowerPoint.

Microsoft Office Button

1. Click the **Microsoft Office Button**, point to **Publish**, and then click **Create Document Workspace**.

   The Document Management task pane opens, with the name of the presentation in the Document Workspace Name box.



2. In the **Location for new workspace** box, type the URL of the Marketing Team site (not of a specific page). Then click **Create**.

> **Tip** If you've previously connected to a site from the Document Management pane, it appears in the Location For New Workspace list.

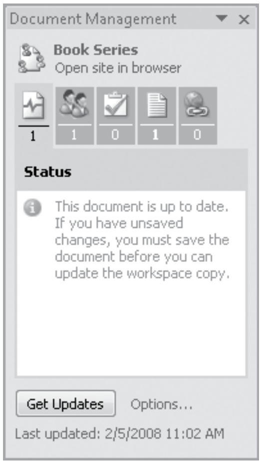
PowerPoint displays a couple of message boxes to report its progress.

> **Troubleshooting** A message might appear saying that the URL you have typed is a restricted or non-trusted site. If this message appears, open your Web browser and add the URL to your list of trusted sites. Then click Create again.

3. If you are asked to supply your user name and password to connect to the site, enter your SharePoint site credentials in the **User name** and **Password** boxes, and then click **OK**.

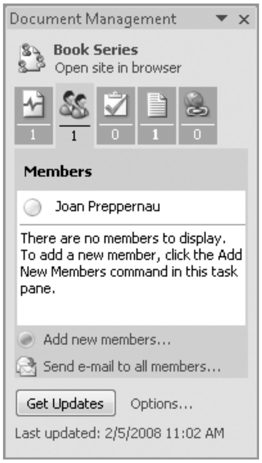
SharePoint creates a document workspace for the Book Series presentation in the Shared Documents library of the Marketing Team site. The Document Management task pane changes to display commands you can use to work with the shared document.

The Status tab displays information about changes that you or other workspace members have made to the shared document.



Members

4. In the **Document Management** task pane, click the **Members** tab.



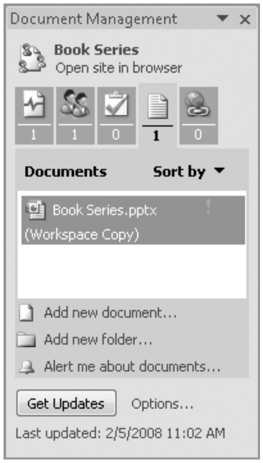
Document workspace members are people with permission to view and work with content in the document workspace. By default, you are the only member of the workspace. You can add other members either by e-mail address or by SharePoint site user name.

Tasks

5. In the **Document Management** task pane, click the **Tasks** tab.

This tab displays the contents of the Tasks list that is part of the document workspace. You can enter new tasks either from this tab or directly into the Tasks list.

6. In the **Document Management** task pane, click the **Documents** tab.



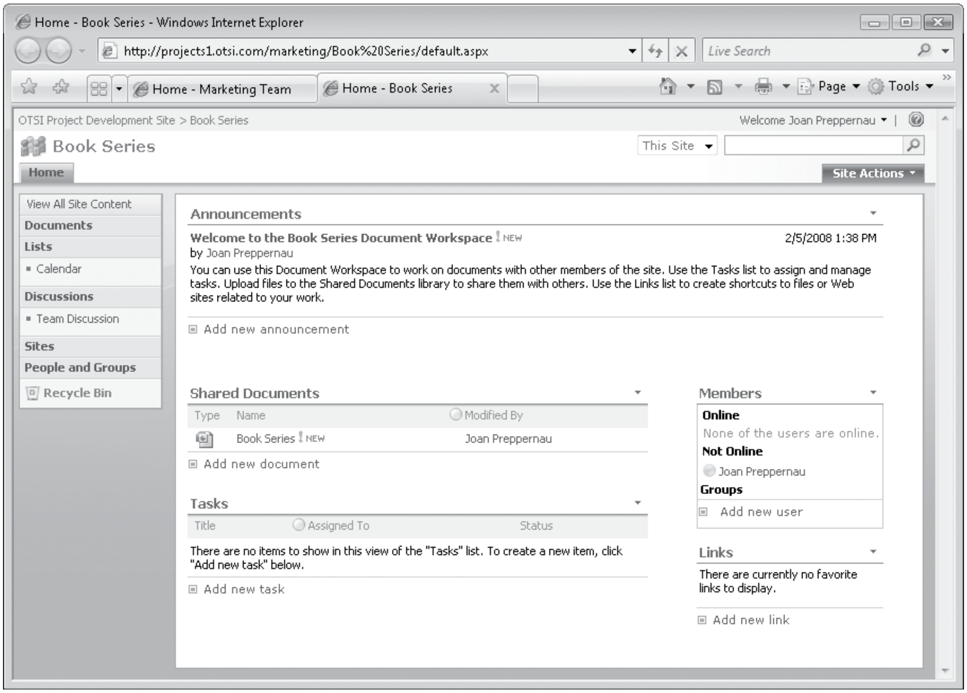
A document workspace is created for an individual document. You can add related documents to the workspace, as you would to a document library.

7. In the **Document Management** task pane, click the **Links** tab.

This tab displays the contents of the Links list on the document workspace. The purpose of this list is to provide links to related electronic information.

8. At the top of the **Document Management** task pane, below **Book Series**, click **Open site in browser**.

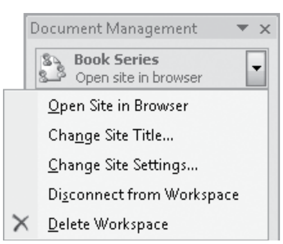
Your default Web browser starts, if it isn't already open, and displays the document workspace.



9. Experiment with the information in the document workspace. Then when you finish, return to PowerPoint.

10. At the top of the **Document Management** task pane, point to the name of the workspace, and then click the arrow that appears.

    A list of workspace commands appears.



11. In the list, click **Delete Workspace**, and then click **Yes** to confirm the deletion.

CLOSE PowerPoint.

Working with a Slide Library

If your organization is running Office SharePoint Server 2007 and has enabled ***slide libraries***, you and your colleagues can store PowerPoint slides or even entire presentations in the library so that they are available for use in any presentation. You can then repurpose the slides instead of having to create them from scratch.

For example, suppose a graphically gifted person has developed a slide with a sophisticated chart showing the percentage of income derived from the sale of different categories of merchandise. He or she can store the slide in a slide library so that other people can use it in their presentations without having to take the time to develop a similar chart. Larger organizations might even have people on staff with responsibility for creating this type of slide, so that they can ensure that all slide shows convey the same information in the same professional way.

To store slides in a slide library:

1. In PowerPoint, click the **Microsoft Office Button**, point to **Publish**, and then click **Publish Slides**.

   The Publish Slides dialog box opens.
2. In the **Publish Slides** dialog box, select the check box for the slide you want to store in the library.

   You can also right-click a slide that you want to publish and then click Publish Slides to display the dialog box with that slide already selected.
3. If the URL of your SharePoint slide library does not appear in the **Publish To** box, click the box, and type the URL.
4. Click **Publish** to store the slide in the slide library.

To insert a slide from a slide library:

1. Click the slide after which you want the new slide to appear.
2. On the **Home** tab, in the **Slides** group, click the **New Slide** arrow, and then in the list, click **Reuse Slides**.
3. In the **Reuse Slides** task pane, in the **Insert slide from** box, type the URL of your SharePoint slide library, and then click the **Go** arrow.
4. Double-click the thumbnail of the slide you want to insert in the active presentation.

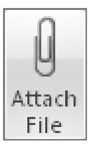
Creating a Document Workspace from Outlook

To share a final document, such as procedural documentation or a sales report, with other members of your organization, you can send the document as an attachment to an e-mail message. However, if you want your co-workers to review and edit the document, you can quickly create a document workspace from Outlook by sending the file as a shared ***attachment*** to an e-mail message. Shared attachments are made available within a document workspace and can be automatically updated with changes that recipients make.

See Also For information about creating workspaces for collaborating on meetings, see the sidebar "Creating a Meeting Workspace" in Chapter 19, "Managing Appointments, Events, and Meetings."

To create a document workspace from Outlook.

1. Open a new message window, address the message to the people you want to invite to the document workspace, and enter the message subject.

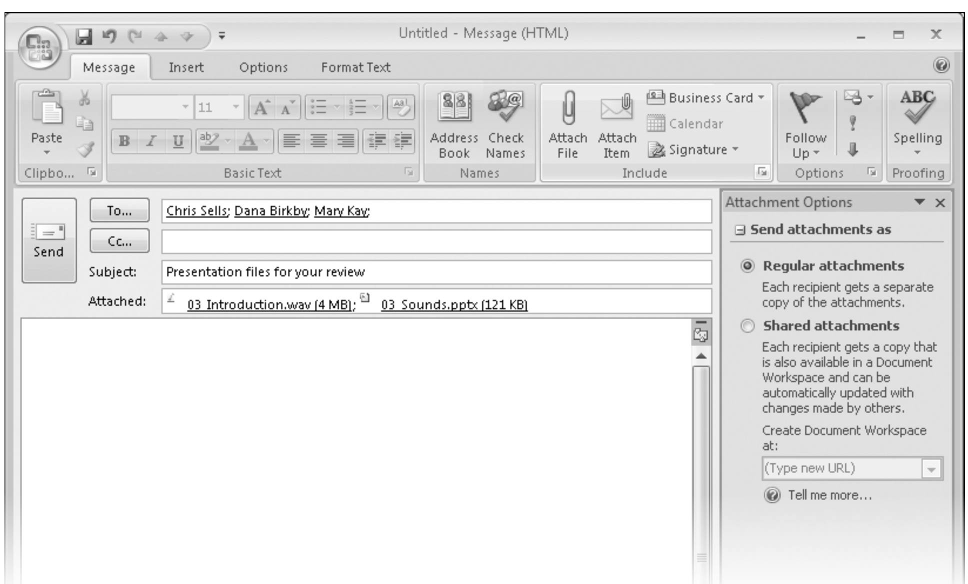


2. On the **Message** tab, in the **Include** group, click the **Attach File** button.
3. In the **Insert File** dialog box, browse to and select the file you want to share through the document workspace, and then click **Insert**.

Dialog Box Launcher

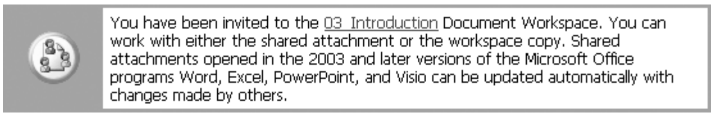
4. Click the **Include** dialog box launcher.

   The Attachment Options task pane opens.



5. In the **Send attachments as** area, click **Shared attachments**.
6. In the **Create Document Workspace at** box, type the URL of your SharePoint site (or if the site address appears in the list, click it), and then press the Tab key.

   An invitation to the document workspace that will be created when you send the e-mail message appears in the content area.

7. Send the message.

   A document workspace containing the file you attached to the message is created on the specified SharePoint site. The message recipients are added to the workspace as members; you don't need to take any other action to give permission to edit the document, but you can add other members to the workspace if you want.

   You receive a message confirming that the workspace was successfully created, and the message recipients receive the invitation message. Each message contains a link to the document workspace.

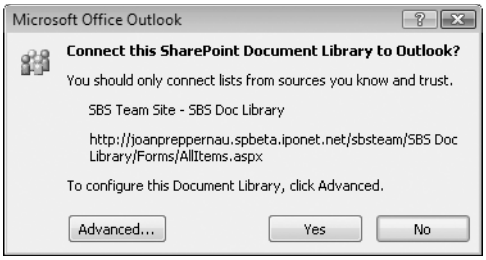
Working Offline with Document Library Contents

You can create a copy of an Office SharePoint Server 2007 document library as a folder in Outlook 2007. You can then preview in the Outlook Reading pane or message window any document, workbook, or presentation that is stored in the document library, or you can work with a local copy of the document, workbook, or presentation on your computer.

To copy document library contents to Outlook:

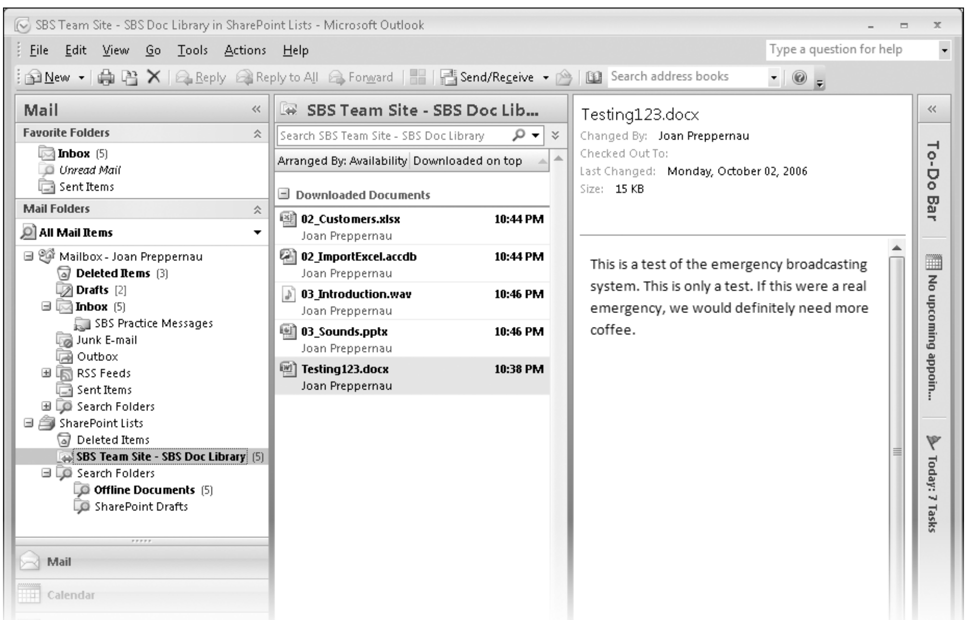
1. Display the SharePoint document library you want to work with.
2. On the **Actions** menu, click **Connect to Outlook**. If an **Internet Explorer Security** alert appears (on computers running Windows Vista), click **Allow**.

   Outlook starts, if it isn't already running, and a message box appears asking if you want to connect the SharePoint document library to Outlook.



3. In the message box, click **Yes**. If a **Connect** dialog box appears, prompting you for your site credentials, enter your user name and password, and then click **OK**.

   Outlook creates and displays a folder named for the site and document library as a subfolder of the *SharePoint Lists* folder in your mailbox. It then downloads a copy of each of the items stored in the document library as an Outlook item within the folder. The icon to the left of each item name indicates the file type (for example, document, workbook, presentation, or database).



> **Tip** Outlook creates the *SharePoint Lists* folder the first time you connect a document library or other SharePoint list to Outlook.

You can preview any item by clicking it, or open a read-only version of the item by double-clicking it.

To modify a document from Outlook and then merge the changes into the original version in the document library:

1. In the *SharePoint Lists* folder, open the item you want to change.

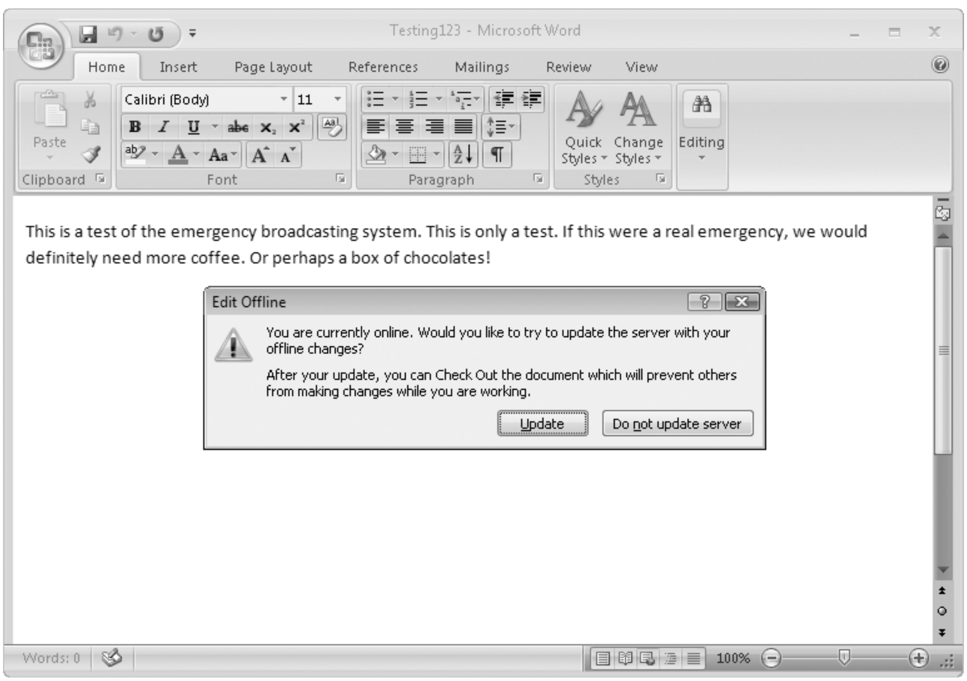
   A banner at the top of the window informs you that you're working in an Offline Server Document.

   > **Tip** Opening an offline file does not check out the file to you in the document library.

2. To make changes, click **Edit Offline**.

   While you work with an offline copy of a file, a local version is stored in the *SharePoint Drafts* folder (a subfolder of the *SharePoint Lists* folder). An icon depicting a red arrow on a page indicates that you are currently editing the item.

3. To transfer changes from the offline file to the file in the document library, save your changes, close the file, and then reopen it. In the **Edit Offline** message box that appears, click **Update**.



Linking a SharePoint Calendar to Outlook

A SharePoint calendar is a type of list; you can view it in traditional calendar view or as a list of entries. For each calendar entry you can record information such as the name, place, start date and time, and end date and time.

If your organization maintains team calendars on a SharePoint site to track project milestones, vacations and holidays, or other events of interest, you might find it convenient to view the calendar in Outlook rather than on the site. By linking a SharePoint calendar to Outlook, you have access to it whether you are online or offline. The linked SharePoint calendar is accessible in the Outlook Calendar pane, either by itself, beside another calendar, or overlaid on another calendar. You can work with the SharePoint calendar as you would with any other calendar. Any changes you make to the SharePoint calendar in Outlook are reflected in the calendar on the SharePoint site, and vice versa.

> **Tip** Calendar updates are transferred only when you are online. Changes that you make to a calendar while offline will be transferred the next time you connect.

In this exercise, you will link a SharePoint calendar to Outlook and then update the calendar from Outlook.

> **USE** the Marketing Team site you created earlier in this chapter.
> **BE SURE TO** configure Outlook before beginning this exercise.

1. Display the home page of the Marketing Team site, and in the content pane, click the **Calendar** heading.

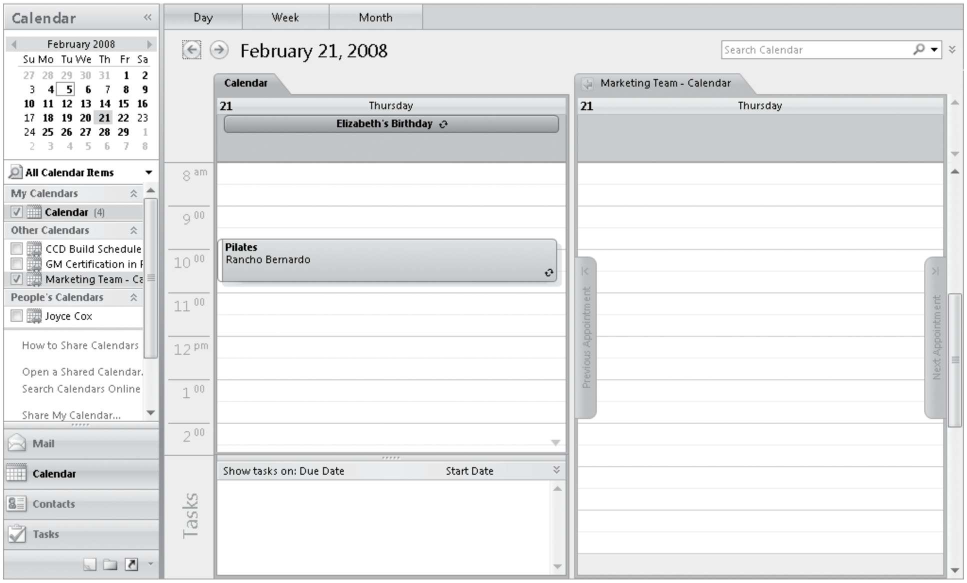
   The SharePoint team site calendar opens.

2. On the **Actions** menu, click **Connect to Outlook**. If an **Internet Explorer Security** alert appears, click **Allow**.

   Outlook starts, if it isn't already running.

3. In the **Microsoft Office Outlook** message box asking you to confirm that you want to connect the SharePoint calendar to Outlook, click **Yes**. If a **Connect** dialog box prompts you for your site credentials, enter your user name and password, and then click **OK**.

Outlook displays the SharePoint calendar beside your own. The calendar displays the same date range or time span as your Outlook calendar.



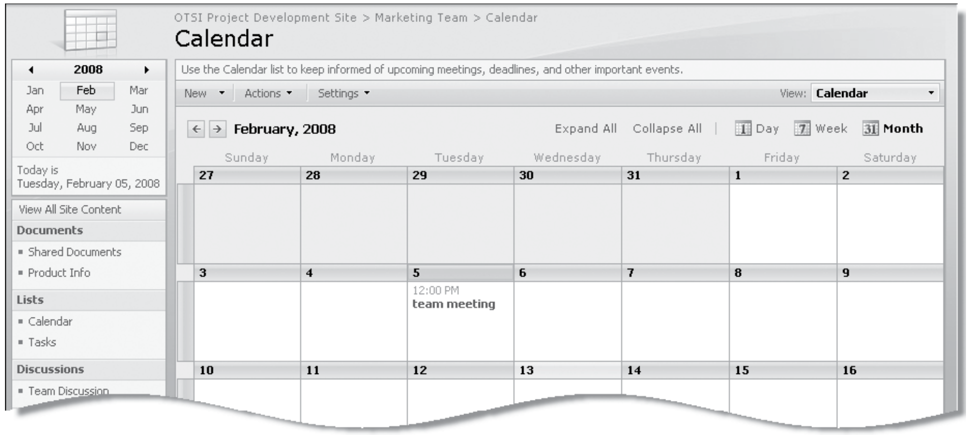
4. Scroll the Outlook calendar to display a different date.

   The SharePoint calendar moves in unison with the Outlook calendar.

5. In Outlook, on the SharePoint calendar, create an appointment for the current date.
6. Minimize the Outlook window to display the Calendar list on the Marketing Team site.

   The appointment you created in Outlook is reflected on the SharePoint calendar.

> **Troubleshooting** If the appointment is not immediately visible, click F5 to refresh the Web page.



CLOSE Outlook.

Subscribing to a SharePoint Site RSS Feed

Many news sites, weblogs (or *blogs*), and other online information providers use ***Really Simple Syndication (RSS)*** to automatically feed information to subscribers. With Windows SharePoint Services 3.0, every SharePoint list and library is RSS-enabled. If you have an RSS reader (such as Outlook 2007), you can subscribe to the RSS feed for a document library or list. Changes to the content appear in your RSS reader.

To subscribe to an RSS feed for a library or list:

1. Display the library or list whose feed you want to subscribe to.
2. In the **Actions** list, click **View RSS Feed**.

   The RSS feed page of the selected document library or list opens. The page provides links to each document in the library or item in the list and information about the most recent update of each.
3. In the yellow box at the top of the page, click **Subscribe to this feed**.

   Outlook 2007 starts if it is not already running.
4. In the Internet Explorer message box asking you to confirm that you want to add the RSS feed to the *Feeds* folder in your Favorites Center, click **Subscribe**.

Key Points

- Programs in the 2007 Office system are designed to integrate seamlessly with Windows SharePoint Services and Office SharePoint Server.
- You can store and share documents in document libraries to make them available to team members.
- You can create file-specific document workspaces for the purpose of collaborating on content. After finalizing the document, you can move the final version to another location and delete the document workspace.
- You can make information from an Excel workbook easily available to team members by importing it as a SharePoint list.
- You can import information from a SharePoint list into an Access database table. To maintain updated information both on the SharePoint site and in the Access database, you can link the list to the database as a linked table.
- You can work offline with SharePoint list and library content, including files, calendars, and RSS feeds, by linking the SharePoint site content to Outlook.

Glossary

action query In Access, a type of query that quickly updates information or deletes selected records from a table. See also *crosstab query*, *select query*, and *parameter query*.

active cell In Excel, the cell that is currently selected and open for editing.

aggregate function In Access, a function, such as Sum, Avg, or Count, that groups fields and performs calculations on the field values.

append query In Access, a query that adds, or appends, records from one or more tables to the end of one or more tables.

appointment In Outlook, a block of time you schedule on your calendar that has a defined start time and end time, and to which you do not invite other attendees.

appointment window In Outlook, the program window displaying the form in which you enter information about an appointment.

archiving In Outlook, moving older or unused items to a secondary location for the purpose of backing up or long-term storage.

arguments The specific data a function requires to calculate a value.

arithmetic operator An operator that is used with numerals: + (addition), - (subtraction), * (multiplication), or / (division).

arrangement The order in which Outlook displays messages or other items.

aspect ratio In computer displays and graphics, the ratio of the width of an image or image area to its height. The aspect ratio is an important factor in maintaining correct proportions when an image is printed, rescaled, or incorporated into another document.

attachment A file attached to an e-mail message.

attribute An individual item of character formatting, such as style or color, which determines how text looks.

auditing The process of examining a worksheet for errors.

AutoArchive An Outlook feature that automatically archives items meeting specific age and location criteria at regular intervals.

AutoComplete An Excel feature that automatically completes data entry for a cell based on similar values in other cells in the same column.

AutoCorrect A feature that corrects common capitalization and spelling errors (such as changing *teh* to *the*) as you type them.

AutoFill An Excel feature that extends a series of values based on the contents of one cell.

back matter Portions of a publication that are typically located after the main content, such as an index, glossary, or bibliography.

background The underlying scheme, including colors, shading, texture, and graphics, that appears behind the text and objects on a slide or in a publication.

bleed The extent to which an element extends beyond the edge of the printed page.

bleed marks Horizontal and vertical lines indicating the bleed on a printed page. See also *crop marks*.

bound Linked, as when a text box in Access is linked to a specific field in a table. See also *unbound*.

building block Frequently used text saved in a gallery, from which it can be inserted quickly into a document.

bulk mail A large amount of mail (at least 500 pieces), which the post office discounts to a bulk rate from the regular cost of postage.

bullet point An item in a list in which each list entry is preceded by a symbol, rather than by a number.

calendar item windows A collective term that refers to the Outlook program windows displaying the forms in which you enter information about appointments, meetings, and events.

card stock A heavy weight of paper, also known as *postcard paper*.

case The capitalization (uppercase or lowercase) of a word or phrase. In title case, the first letter of all important words is capitalized. In sentence case, only the first letter of the first word is capitalized.

cell In Excel, a box at the intersection of a column and row in a table or worksheet.

cell address In Excel, the location of a cell, expressed as its column letter and row number, as in A1.

cell range In Excel, a group of cells.

character formatting The collection of attributes applied to text.

character spacing The space between characters, which can be expanded or contracted so that characters are pushed apart or pulled together.

character style A variation of a font, such as bold or italic.

chevrons The « or » characters that surround data fields in a Publisher publication.

Click and Type A Word feature that allows you to double-click a blank area of a document to position the insertion point in that location, with the appropriate paragraph alignment already in place.

Clipboard A storage area where cut or copied items are stored. The Clipboard is shared by all Office programs.

CMYK A method of creating colors by using combinations of cyan, magenta, yellow, and black. See also *process colors*.

color gradient A visual effect in which a color gradually changes from light to dark, from dark to light, or from one color to another.

color scheme In PowerPoint, a set of 12 complementary colors used for different elements of a PowerPoint slide. A color scheme consists of a background color, a color for lines and text, and additional colors balanced to provide a professional look. In Publisher, the set of default colors specified for a template or publication.

column In a chart, a vertical representation of plotted data from a table or worksheet. In page layout, the area between margins where text is allowed to flow. (Pages can have one column or multiple columns.)

column break A break inserted in the text of a column to force the text below it to move to the next column.

combo box A control that displays a list of choices when you click the arrow on its right side. It might also allow you to enter a different choice from those available on the list.

command button A control that appears as a button, which performs an action when clicked.

comparison operator An operator that compares values: < (less than), > (greater than), and = (equal to). These operators can also be combined, as in <= (less than or equal to), >= (greater than or equal to), and <> (not equal to).

conditional format In Excel, formatting that is applied only when cell contents meet certain criteria.

conditional formula In Excel, a formula that calculates a value using one of two different expressions, depending on whether a third expression is true or false.

constant A part of an expression that represents a value that doesn't change.

content library A location on a SharePoint site where you can create, collect, update, and manage files. Each library displays a list of files and key information about the files. You can customize libraries in several ways.

continuing a story In Publisher, the process of connecting text boxes so that text that doesn't fit in one text box flows into another text box.

control property An Access setting, accessible through the Properties dialog box, that determines a control's appearance and what kind of data it can display.

control source The Access object, such as a field, table, or query, to which a control is bound. See also *record source*.

copyfit To format text so that it fits within a text box.

copyright A form of protection for artistic or literary works.

crop marks Horizontal and vertical lines indicating the four corners of a publication page, when printing a publication on a sheet of paper that is larger than the desired output.

crosstab query In Access, a query that calculates a sum, average, count, or other type of total for data that is grouped by two types of information. See also *action query*, *parameter query*, and *select query*.

custom slide show A set of slides extracted from a PowerPoint presentation to create a slide show for an audience that doesn't need to see the entire presentation.

data field In Publisher, a category of information that corresponds to a field (usually a column) in a data source.

data source In Publisher, a file that contains the information to be merged into a publication.

database application A database that is made easier to use by the inclusion of queries, forms, reports, a switchboard, custom categories and groups, and various other tools.

Date Navigator The small calendar that appears next to the appointment area in the Outlook Calendar. The Date Navigator provides a quick and easy way to change and view dates.

delete query In Access, a query that deletes records that match a specified pattern from one or more tables.

demote In a Word outline, to change a heading to a lower-level heading or body text.

dependent In Excel, a cell with a formula that uses the value from a particular cell.

deselect To click away from selected data or controls to release the selection.

design grid In Design view in Access, the grid in which you can manually work with advanced filters and queries.

design template A PowerPoint presentation file containing only design elements. The file can be used as a basis for creating new presentations.

desktop publishing A process that creates pages by combining text and objects such as tables and graphics in a visually appealing way.

destination file A file into which you insert an object created in another program.

Dialog Box Launcher In the Office Fluent user interface, a button that launches a dialog box containing options for refining a command.

digital signature A security mechanism used on the Internet that relies on two keys, one public and one private, that are used to encrypt messages before transmission and to decrypt them on receipt.

direct mail A service provided by some copy and print shops, in which they merge your publication and data source while printing, sort the printed pieces, and then deliver them to the post office, ready for bulk mailing.

document library On a SharePoint site, a content library for the purpose of storing many file types, including documents and workbooks. You can store other kinds of files in a document library, although some file types are blocked for security reasons. You can create documents in programs that are compatible with Windows SharePoint Services directly from a document library. See also *content library*.

Document Map A Word pane that displays a linked outline of a document's headings and allows you to jump to a heading in the document by clicking it in the Document Map.

document window The Word window that provides a workspace for an open document.

document workspace A temporary space, usually on a SharePoint site, dedicated to one document. It provides a forum where everyone can work from one location.

download settings Settings that control how and when Groove downloads files and workspaces to your computer.

draft In Outlook, a temporary copy of a message that has not yet been sent, located in the Drafts folder.

Draft view A view in Word that displays the content of a document with a simplified layout.

drag-and-drop editing A method of moving or copying selected text by dragging it with the mouse pointer.

dragging A method of moving objects by pointing to them, holding down the mouse button, moving the mouse pointer to the desired location, and releasing the button.

duplex Two-sided, as in printing. Some printers are capable of duplex printing, or printing on both sides of the paper.

duplicate query In Access, a type of select query that finds records containing identical information in one or more specified fields.

e-mail Short for electronic mail; messages sent between defined entities over the Internet.

e-mail signature A block of text that is appended to the end of a message you send.

e-mail trail An e-mail message and all responses to that message. When an individual message receives multiple responses, the e-mail trail can branch into multiple trails. In Outlook, you can view all the branches of an e-mail trail in Conversation view.

embedded object An object that is created in a different program but that is incorporated into a document.

empty string An Access field that has two quotation marks with nothing in between. Access is able to differentiate between an empty string and a Null (blank) field.

error code A brief message that appears in an Excel worksheet cell, describing a problem with a formula or a function.

event In Access, an action, including Click, Double Click, Mouse Down, Mouse Move, and Mouse Up, to which code can be attached. The events recognized by an object are listed on the Event tab in the object's Property Sheet pane. In Outlook, a block of time you schedule on your calendar that does not have a defined start time and end time.

event window The Outlook program window displaying the form in which you enter information about an event.

expression A combination of functions, field values, constants, and operators that can be used to assign properties to tables or forms, to determine values in fields or reports, as a part of a query, and in many other places. Also known as a *formula*.

Expression Builder An Access tool with which you can quickly create expressions (formulas) in queries, forms, and reports.

field A placeholder indicating that the specified information should be supplied in the specified way. Also, the set of information of a specific type in a data source, such as all the last names in a contacts list.

field property In Access, a property that controls what can be put into a field and how it can be placed there.

file sharing workspace A type of Groove workspace that you create by using a folder on your Windows file system. You can use an existing folder or create a folder to use as the file sharing workspace. You can invite other people to be members of a file sharing workspace.

fill handle In Excel, the square at the lower-right corner of a cell. You drag the fill handle to indicate other cells that should hold values in the series defined by the active cell.

Fill Series An Excel feature that allows you to extend a series of values based on the contents of two cells, where the first cell has the starting value for the series and the second cell shows the increment.

filtering In Access, a method of organizing information so that some combination of characters is displayed or excluded from the display.

firing events The process by which objects signal that something has happened in an Access form.

flow The continuation of text from the bottom of one column to the top of the next column.

font A complete set of characters that all have the same design.

font color One of a range of colors that can be applied to text.

font effect An attribute, such as superscript, small capital letters, or shadow, that can be applied to a font.

font size The size of the characters in a font, in points.

font style An attribute that changes the look of text. The most common font styles are regular (or plain), italic, bold, and bold italic.

footprint The amount of space required by an element.

formula An expression used to calculate a value.

Formula AutoComplete The Excel feature that allows you to enter a formula quickly by selecting functions, named ranges, and table references that appear when you begin to type the formula into a cell.

front matter Portions of a publication that are typically located before the main content, such as a table of contents or an introduction.

Full Screen Reading view A Word view that displays as much of the content of the document as will fit in the screen at a size that is comfortable for reading.

function A named procedure or routine in a program, often used for mathematical or financial calculations.

gallery A grouping of thumbnails that display options visually.

global formatting A theme or style applied to an entire document.

gridlines Lines that visually clarify the information in a chart.

group A category of buttons on a tab.

Guest A Groove workspace role with limited or no default permissions. The Guest role should be assigned to members who review the work conducted in the workspace but who are not active participants.

handle A small circle, square, or set of dots on the frame of an object, which you can drag to change the size and shape of the object.

hover To pause the pointer over an object, such as a menu name or button, for a second or two to display more information, such as a submenu or ScreenTip.

HSL A method of identifying a color in terms of its position in the rainbow (hue), its purity or vividness (saturation), and its brightness (luminance).

Hypertext Markup Language (HTML) An e-mail message format that supports paragraph styles, character styles, and backgrounds. Most e-mail programs support the HTML format.

importance The property defining the urgency of a message or other Outlook item. The default setting is Normal; you can optionally change the setting for an individual item or for all items to High or Low.

indent marker In Word, a marker on the horizontal ruler that controls the indentation of text from the left or right side of a document.

information set Information about an individual or an organization (such as a name, address, phone number, and e-mail address) that is commonly included in business cards, flyers, newsletters, and other publications.

justify To make all lines of text in a paragraph or column fit the width of the document or column, with even margins on each side.

key combination A combination of two or more keys that performs an action when the keys are pressed at the same time. Also called a *keyboard shortcut*.

landscape The orientation of a horizontal page whose width is larger than its height.

leaf The front and back of one page of a publication.

line break A manual break that forces the text that follows it to the next line. Also called a *text wrapping break*.

linked object An object that exists in a source file and that is inserted in a destination file with a link to that source file.

Live Preview A feature of the Office Fluent user interface that displays what an option will look like if applied to a selection.

local formatting In Word, formatting applied at the text or paragraph level.

logical operator A type of operator used in an Access expression, with the most common logical operators being *and*, *or*, and *not*. Logical operators can also be used to work with true/false (Boolean) values.

Lookup wizard An Access wizard with which you can easily create a lookup list.

mail merge A process that combines the static information in a publication with the variable information in a data source (a mailing list or any other type of database) to create one copy of the merged publication for every record in the data source.

make-table query An Access query that combines all or part of the data from one or more tables into a new table.

Manager A Groove workspace role with wide-ranging permissions to invite others to become members, add and delete tools, assign roles to other members, and adjust permissions granted to a role. The person who creates a workspace has the Manager role by default. A workspace can have more than one member with the Manager role.

many-to-many relationship In Access, two one-to-many relationships tied together through a third table. See also *one-to-many relationship*; *one-to-one relationship*.

margin Blank space around the text column on a page.

mask In Access, a property that controls the appearance, format, and type of data in a field.

master page In Publisher, the page in which the overall publication design is controlled. Anything that appears on the master page appears on every page. Most master page elements can be changed only on the master page.

meeting request A message generated by Outlook to invite people to attend a meeting.

meeting window The Outlook program window displaying the form in which you enter information to place a meeting on your calendar.

meeting workspace A SharePoint site for planning a meeting and tracking related tasks and results.

message header Basic information identifying an e-mail message, such as the date, time, sender, subject, and size. In Outlook, when you are working on a slow connection, you can download message headers and, based on the header information, decide whether to download the entire message.

message window The Outlook program window displaying the form in which you create or respond to an e-mail message.

Microsoft Office Button In the Office Fluent user interface, a button that provides access to a menu with commands that manage Office programs and Office files as a whole (rather than file content).

Microsoft Office PowerPoint Viewer A viewer with which you can display presentations on a computer that does not have PowerPoint installed.

Microsoft Office Word Help button A button with a question mark (?) in the upper-right corner of the program window that can be clicked to open the Help window.

Mini toolbar In the Office Fluent user interface, a small contextual toolbar containing options for formatting that appears when you select text.

move handle The handle by which you can drag a docked toolbar. The move handle is represented by a row of four dots at the left end of the toolbar.

named range In Excel, a group of related cells defined by one name.

nested table A table that is positioned inside another table.

newsletter A periodic publication containing information of interest to a specific group—for example, employees of a company or members of a club or other organization.

note container In OneNote, the smallest data storage unit. Notes on a page are stored within note containers; each note container can be individually manipulated.

notebook The folder containing OneNote data files.

object An item, such as a graphic, video clip, sound file, or worksheet, that can be inserted and then selected and modified.

object selector In OneNote, the handle that appears to the left of a text paragraph, graphic, table, or other individually selectable item within a note container or on a page.

Office menu A menu containing commands related to managing files (such as creating, saving, and printing) that appears when you click the Microsoft Office Button. This menu takes the place of the File menu.

one-to-many relationship In Access, a relationship in which each record in one table is linked to multiple records in another table. See also *many-to-many relationship*; *one-to-one relationship*.

one-to-one relationship In Access, a relationship in which each record in one table has one and only one associated record in the other table. See also *many-to-many relationship*; *one-to-many relationship*.

operator See *arithmetic operator*; *comparison operator*; *logical operator*.

option button In Access, a form control with which users can choose preselected settings.

orientation The direction—horizontal or vertical—in which a page is laid out.

Outline view In Word, a view that shows headings and body text and can be used to evaluate and reorganize the structure of a document.

Outlook Rich Text Format (RTF) An e-mail message format that supports paragraph styles, character styles, backgrounds, borders, and shading, but is compatible with only Outlook and Exchange Server. Outlook converts RTF messages to HTML when sending them outside of your Exchange network.

Package for CD A PowerPoint feature that helps you gather all the components of a presentation and store them on a CD or another type of removable media so that they can be transported to a different computer.

page In OneNote, a titled data storage unit within a section.

Pantone Matching System (PMS) A proprietary system developed by Pantone, Inc. to give designers in color-critical industries such as publishing, packaging, decorating, and architecture the means to communicate with printers and manufacturers.

paragraph In word processing, a block of text of any length that ends when you press the Enter key.

paragraph formatting Collectively, the Word settings used to vary the look of paragraphs.

paragraph style In Word, a set of formats that can be applied to the paragraph containing the insertion point by selecting the style from a list.

parameter query In Access, a query that prompts for the information to be used in the query, such as a range of dates. This type of query is useful when used as the basis for a report that is run periodically. See also *action query*; *crosstab query*; and *select query*.

parent folder The folder in which another folder is contained.

Participant A Groove workspace role for members who are active in the workspace but who are not responsible for managing or authorized to manage every aspect of the workspace.

Pick From Drop-Down List In Excel, the feature that makes it possible to enter a value into a cell by choosing a value from the set of values already entered in cells in the same column.

placeholder An area on a PowerPoint slide into which you should enter a specific type of content.

Plain Text An e-mail message format that does not support character or paragraph formatting. All e-mail programs support Plain Text.

point The unit of measure for expressing the size of characters in a font, where 72 points equals 1 inch.

populate To add data to a table or other object.

Portable Document Format (PDF) file A device-independent and resolution-independent file format for representing documents containing any combination of text and images.

portrait The orientation of a vertical page whose width is smaller that its height.

precedent In Excel, a cell that is used in a formula.

Print Layout view A Word view that shows how a document will look when printed.

process color A method of printing colors by using four inks (cyan, magenta, yellow, and black, also known as *CMYK*) to produce all other colors.

promote In a Word outline, to change body text to a heading, or to change a heading to a higher-level heading.

property A file detail, such as an author name or project code, that helps identify the file.

public domain Belonging to the public, such as text or artwork that anyone can use in a publication.

Quick Access Toolbar In the Office Fluent user interface, a toolbar that displays the Save, Undo, and Repeat buttons by default, but can be customized to show other commands.

Quick Styles A feature of programs that use the Office Fluent user interface; predefined sets of formatting options that you can apply to selected elements.

quick table A Word table with sample data that you can customize.

range A group of related cells.

read-only Available for viewing but protected from alterations.

Really Simple Syndication (RSS) An XML standard for syndicating data. A site owner can use RSS to make news, blogs, and other content on a Web site available to subscribers. On a SharePoint site, RSS support is enabled by default at the site collection level. All new sites that are created in an RSS-enabled site collection are also RSS-enabled. You can enable or disable RSS on a site, subsite, or workspace.

recall To instruct Outlook to delete or replace any unread copies of a message already sent.

record selector In Access, the gray bar along the left edge of a table or form. You can select an entire record by clicking the record selector next to it.

record source In Access, the source from which the data in a bound record originates. See also *control source*.

recto In a two-page spread, the right, odd-numbered page of the spread.

recurring Repeating on a regular basis. In Outlook, you can specify an appointment, meeting, or event as recurring, and specify the frequency of recurrence. Outlook then creates a series of items based on your specifications.

relationship In Access, an association between common fields in two or more tables.

relative reference A cell reference in an Excel formula, such as =B3, that refers to a cell that is a specific distance away from the cell that contains the formula. For example, if the formula =B3 were in cell C3, copying the formula to cell C4 would cause the formula to change to =B4.

reminder An optional message displayed by Outlook a specific amount of time prior to an appointment, meeting, event, or task milestone. You can dismiss the reminder, reset it for a later time, or open the item from the reminder window.

resend To create a new version of an original message with none of the extra information that might be attached to a forwarded message.

result In an Access formula, the outcome of the equation.

RGB A method of identifying a color in terms of a combination of red, green, and blue.

Ribbon In the Office Fluent user interface, an area across the top of the screen that makes almost all the capabilities of a program available in one area.

Rich Text Format (RTF) A text format that can be opened by many programs. In PowerPoint, RTF is used to export presentation content as an outline.

role A designation assigned to each Groove workspace member that grants that member specific permissions for the work that he or she can do in the workspace. A member can be assigned the Manager, Participant, or Guest role.

saddle-stitching A type of binding in which pages are stapled in the middle and then folded to create a booklet. Also called *stapling*.

sans serif A style of typeface with no ornamentation on the upper or lower end of the character.

screen clipping In OneNote, a captured image of content shown on the screen. OneNote provides a tool for defining, capturing, and importing screen clippings directly into the program window.

ScreenTip Information displayed in a small window when you rest the pointer over a button or window element.

Search box The text box into which you enter words or phrases you want to search for.

Search menu The menu from which you specify the scope of a search operation.

section opener In Publisher, a special page that signifies the starting point of a new section of a publication.

section In OneNote, an organizational unit containing a group of pages that you can view separately from other notebook content. In Publisher, a logical group of topics, such as parts, subjects, or time periods.

select To highlight an item in preparation for making some change to it.

select query In Access, a query that retrieves, or selects, data matching specified criteria from one or more tables and displays the results in a datasheet. See also *action query*, *crosstab query*, and *parameter query*.

selection area An area in a Word document's left margin in which you can click and drag to select blocks of text.

selector In Access, a small box attached to an object that you click to select the object. You can then drag the selector to resize the object. Also known as a *handle* or *sizing handle*.

sensitivity An optional Outlook setting that indicates, by icons or words, that an item is Personal, Private, or Confidential.

shared attachment An attachment saved on a SharePoint document workspace Web site, where a group can collaborate to work on files and discuss a project.

signature A printed sheet that will be folded into a specific number of pages (often 16). Pages are arranged on the sheet to be in the proper sequence and orientation after the sheet is folded.

sizing handle A handle at the side or in the corner of a selected object, which you can drag to make the object larger or smaller.

slide library A content library for the purpose of storing, sharing, and managing PowerPoint slides. You can create a slide library on your local computer or on a server running Office SharePoint Server 2007. When you publish a presentation to a slide library, the slides upload as individual files, so they can be modified and tracked independently. The library maintains a link to the presentation so that you are notified when the slides change. The library allows you to sort slides and check them out and can help keep track of history. See also *content library*.

slide timing The time a slide will be displayed on the screen before PowerPoint moves to the next slide.

smart tag In Word, Excel, and PowerPoint, a flag that identifies a certain type of information, such as date and time, names, street addresses, or telephone numbers. When the Smart Tag feature is turned on, you can perform actions associated with that type of information.

SmartArt A technology first introduced by Microsoft with the 2007 Office system, with which you can easily create professional business graphics within documents, spreadsheets, presentations, and messages.

sorting In Access, arranging information so that it's based on any field or combination of fields.

source file A file containing an object that is inserted in a destination file.

spot color A method of specifying and printing colors in which each color is printed with its own ink. See also *process color*.

stapling A type of binding in which pages are stapled in the middle and then folded to create a booklet. Also called *saddle-stitching*.

status bar An area across the bottom of a program window that gives information about the open file.

subform In Access, a form contained within another form.

subpoint A subordinate item below a bullet point in a list.

switchboard In Access, a hierarchy of pages containing buttons that the user can click to open additional pages, display dialog boxes, present forms for viewing and entering data, preview and print reports, and initiate other activities.

syntax In Access, the required format in which expressions must be entered.

tab In the Office Fluent user interface, a task-centric segment of the Ribbon, containing groups of commands. In a Word document, a character with which you can specify the amount of space preceding or following a section of text, and its alignment.

tab leader A repeating character (usually a dot or dash) that separates text before the tab from text or a number after it.

tab stop A location in the text column where text will align after you press the Tab key to insert a tab character.

table style In Word, a predesigned combination of font, color, lines, and shading that you can apply to a table.

tablet pen The electronic "pen" supplied with a Tablet PC, which you use to interact with items on the screen.

tabular list In Word, a list that arranges text in simple columns separated by left, right, centered, or decimal tab stops.

team site A SharePoint site that teams can use to create, organize, and share information. It includes a document library and basic lists, such as Announcements, Calendar, Contacts, and Quick Links.

template A ready-made file that users can adapt to meet their requirements.

text box A box drawn independently to contain text that is not part of and can be manipulated separately from the base file.

text box control In Access, a control on a form or report in which text can be entered or edited.

text wrapping break A manual break that forces the text that follows it to the next line. Also called a *line break*.

texture A pattern or gradient applied to the background of a Publisher publication to make it appear more three dimensional.

theme A predefined format that can be applied to a file.

Thesaurus A Word tool that supplies synonyms for a selected word.

threaded A conversation order in which related messages are shown in the order in which they were sent as replies to each other.

thumbnail A picture representation of a choice available in a gallery; or of pages in a document.

title A name you designate for a PowerPoint slide in the Title placeholder.

title bar An area at the top of the program window that displays the name of the active file.

title slide The introductory slide in a PowerPoint presentation.

unbound In Access, not linked to a field, as when a control is being used to calculate values from multiple fields. See also *bound*.

undocking Dragging a toolbar, task pane, or similar item so it floats in the program window.

Unfiled Notes section In OneNote, the information storage unit that exists outside of any specific notebook. By default, OneNote saves screen clippings and Web notes to the Unfiled Notes section.

unmatched query In Access, a select query that locates records in one table without any related records in another table.

update query In Access, a select query that performs an action on the query's results in some way, such as by changing a field.

validation rule In Access, a field property that ensures that entries contain only the correct types of information.

versioning On a SharePoint site, a feature that enables you to store, track, and restore items in a list and files in a library as they are changed. Versioning is available for list items in all default list types and for all file types that can be stored in content libraries. See also *content library*.

verso In a two-page spread, the left, even-numbered page of the spread.

View toolbar In Word, a toolbar on the right end of the status bar that contains tools for adjusting the view of document content.

views Different ways in which the Outlook window can be arranged for viewing messages.

virtual folder In Outlook, a folder that looks like and links to an original folder.

voting buttons Used in conjunction with an Exchange Server account, this Outlook feature enables recipients to respond to a poll by clicking a button corresponding to a specific response option. Responses return to the sender in a format that allows easy collating and tabulation.

Web Layout view In Word, a view that shows how a document will look when viewed in a Web browser.

wildcard character A placeholder, such as an asterisk (*) or question mark (?), representing an unknown character or characters in search criteria.

Windows logo key Also known as the Start key, a key labeled with the Windows logo (a waving flag) located in the bottom row of a standard PC keyboard. Pressing the Windows logo key opens the Start menu. Many programs offer system-related keyboard shortcuts incorporating the Windows logo key and another key.

word processing The writing, editing, and formatting of documents in a word processor.

word wrap The automatic breaking of a line of text when it reaches the page margin.

work week The days and times you define within Outlook as available for work-related activities.

Workspace Explorer In Groove, the window in which you work with workspace tools, workspace members, the Chat tool, and the other features of a workspace.

Index

A

D

G

H

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z